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Motorcycle Tourism in Ceredigion

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People in all the right places

TOURISM SOCIETY WALES PROFESSIONAL DEVELOPMENT AWARD FINAL REPORT

MOTORCYCLE TOURISM IN CEREDIGION



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EXECUTIVE SUMMARY

This report summarises research undertaken for Tourism Society Wales on the extent of Motorcycle tourism in West Wales. The Tourism Society seeks to drive up standards of professionalism in a fast-growing global industry which can have major social, economic and environmental impacts on communities and nations.

This study found that:

- The majority of motorcycling tourists are over 45 years of age, illustrating that the motorcycle tourism market is older and likely has more time and more money to spend on this pursuit. The majority are male but there are a growing number of female riders.
- Among those who use motorcycles for recreation in this survey, motorcycles were used for leisure and tourism purposes 75% of the time. They often travel in groups and frequently carry a pillion passenger.
- Over three quarters of motorcycling recreationalists take over ten daytrips a year, and on average 4.7 overnight trips by motorcycle per year, sometimes overseas.
- Motorcyclists identify strongly with the activity, 41% were members of a motorcycle organisation, either a local club, a national or bike specific club or the Motorcycle Action Group.
- Seventy percent of respondents read motorcycling publications, the most popular of these being Motorcycle News (MCN), which was regularly read by 30% of the sample.
- When planning a trip they use other group members, their own knowledge and biker specific websites. They are lower users of generalist motoring or tourism websites.
- When selecting a destination, winding roads in good condition were important, as well as scenic stopping points, easy parking and a place to meet other bikers. They were frequent users of catering facilities, but less of tourism attractions.
- When selecting accommodation, secure parking, proximity to restaurants/pubs, easy to find and helpful hosts were deemed the most important.
- There is a very significant motorcycle event sector. Over three quarters (76%) of those surveyed had been to some form of motorcycle event in the past year
- Wales has strengths in providing guided motorcycle tourism experiences overseas and domestically. A variety of businesses and organisations promote and encourage considerate trail biking in Mid Wales, and provide a unique tourism product.
- Average daily expenditure on meals was £21, travel £30 and accommodation was £48 per night. A conservative estimate of motorcycle related tourism expenditure is £975.30 per motorcyclist per year. Direct expenditure on motorcycle tourism (without multipliers) is estimated to be worth a minimum of £70 million to the Welsh economy per year.
- Greater targeting and servicing of this tourism sector is required, as well as partnership with road safety organisations to ensure education of all road users.

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DEFINING MOTORCYCLE TOURISM

Motorcycle tourism may be seen by some as a subsector of the drive tourism market. This sector is undeniably one of the most important for rural destinations worldwide. However, it has fallen out of favour with research and destination organizations as a result of a poor image relating to the current unsustainability of the transport form. Motor-based tourism in general is unpopular in promotion terms due to concerns with fossil fuel use. However, since most motorcycles use far less petrol than the average car, there is potential here to promote motorcycle tourism as a more sustainable form of drive tourism.



It is important to note that motorcycle tourism differs from drive tourism in respect of a much greater attachment to the vehicle itself, an increased likelihood of travelling in groups, and a greater emphasis on the journey aspects of the experience rather than the destination per se. Whereas car drive tourists will enjoy scenic aspects of the tour on the way to tourist sights, it is likely that motorcyclists have a much higher involvement in the driving experience itself. However, motorcyclists may also need to make frequent stops due to limited range, and physical discomfort on the bike.

There may be links between the motorcycling sector and the adventure tourism sector. Both of these sectors may share an attraction of perceived risk. Visit Wales defines the adventure activity sector as *'activities that are focused upon engaging with the natural environment in a physically and mentally challenging manner, where skill acquisition and an element of risk management are central to the experience'* (Visit Wales, 2011). On road motorcycling's engagement with the natural environment is based largely on the scenic qualities of the landscape through which the participant travels, and a much higher feeling of immersion in that landscape, due to the lack of a body around them. The engagement with the environment for a motorcyclist is skills based, has a high degree of physical and mental challenge and relies on constant risk assessment. In this sense, then, motorcyclists are adventure seekers, and it may be appropriate for marketing organizations to cross target this sector.



Tourists travelling by motorcycle fall into the following categories (Northern Ireland Tourist Board, 2006):

- Independent travellers primarily from the UK
- Independent travellers from Ireland and Europe
- Clubs that organise tours and rallies and seek out suitable accommodation en-route
- Specialist motorcycle tour operators
- Bikers attending events

There is a typology of bikers which may be broadly suggested as sports bikers (newer and faster bikes), cruisers (more comfortable touring bikes), classic bikers (vintage and heritage models) and trail bikers (off road motorcyclists). The MCIA defines motorbikes in the following categories:

AdventureSport (including Supermoto) These bikes are similar in style to enduro motorcycles but are predominantly designed for and capable of, on-road use. Often they will have features similar to machines included in the Touring category e.g. fairings, luggage carrying capacity etc.

Custom - These machines include 'cruisers' and 'choppers'. They typically feature high handlebars, low seat height and forward footrests. Body panels and fittings contain high polished chrome content

Naked Machines are built to a basic specification with no fairing (or only a small handlebar fairing) and an upright riding position. Engines are large to medium and often called retro.

Sport/Touring Machines that fit between the SuperSport and Touring categories. Typical features include full or partial fairings and practical rider and pillion seating with low to medium ride handlebars. Tend to have medium to large capacity

SuperSport These machines are designed to mimic or directly replicate racing bikes. They normally have full fairings and low handlebars and are sometimes referred to as race replicas.

Scooters Have an engine, as an integral part of the rear suspension or the chassis is a step-through type, irrespective of cc or wheel size. Includes all types of transmission.

Touring Bikes generally have large engines and are designed for long-distance riding. Typical features include a more comfortable seating position for rider and pillion, luggage carrying capability and weather protection, such as fairings

Trail/Enduro These bikes encompass trials, enduro and trail bikes with an off-road or cross-country capability.

(MCIA 2008)

It is likely that motorcycle tourism would be conducted mostly on the adventure, sport and touring category bikes. Trail biking is also very significant in Wales, and this research has conducted work with off-road operators.

RESEARCH METHODS

In order to gain a greater insight into the motorcycle tourism sector in mid-Wales, this project undertook a detailed investigation into the sector in Ceredigion. Overarching research questions were as follows;

- What are the travel patterns of motorcycle tourists to Ceredigion? What is the average length of trip and do they stay in Ceredigion?
- What facilities do motorcyclists prefer? Is there scope for a Motorcyclists welcome scheme similar to other activity segments?
- What is the socio-economic profile of motorcycle tourists? What is the economic impact of motorcycle tourism to Ceredigion and Wales?



Initial contact was made with the Motorcycle Action Group (MAG) chapter in Aberystwyth, as they were important gatekeepers for motorcycle tourism activity locally. The researcher attended several monthly meetings and discussed the research questions with members. This assisted in questionnaire design and also facilitated attendance at a motorcycle event being organized by the group in July 2011.

A questionnaire was designed to answer the above questions, with sections on respondent demographics, riding behavior, preferences for destination and accommodation attributes and event attendance. A section was also included on expenditure for the current trip which allowed some estimates of daily expenditure on accommodation, travel and subsistence. Information on favourite roads for riding was also collected as well as current route taken. The latter was chosen over a more complex GPS solution initially considered as it simplified the data collection, and accuracy was deemed to be acceptable. There was no need for the detailed information such as speed that could be collected by GPS for this tourism investigation. The questionnaire was pilot tested at a screening of a motorcycling film about the Isle of Man races, 'TT3D'. Although these were mainly local residents they had a high degree of commitment to motorcycling and were a useful sample population to undertake the pilot study. A few minor refinements were added to the questionnaire from this phase.

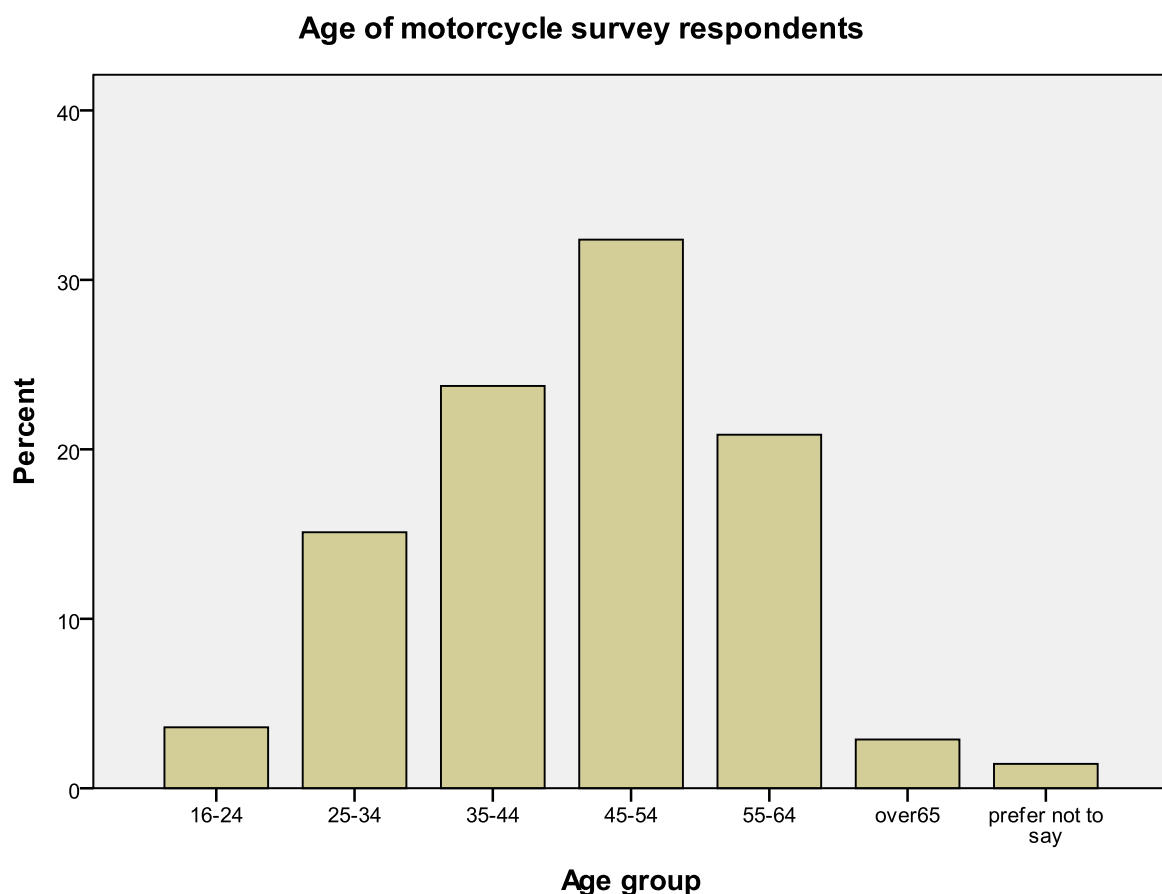
Survey sites were selected based on discussions with MAG and having observed the motorcycle tourism market. Sites needed to be those that were popular with motorcycle visitors and where they were stopping for a reasonable period to answer a questionnaire. The popularity of Aberystwyth seafront, and particularly the café 'PDs Diner', as a stopping

place meant that this was a key location for questionnaire distribution. The Red Kite Café on the A44 near Nant-yr-Arian is also a popular stopping place for motorcyclists, and was selected as a recruitment point. The Hafod Hotel at Devils Bridge was another popular location as it caters to motorcyclists wanting to stop and see the waterfalls. At all three of these locations questionnaires were left for self completion, however, response rates for these were generally poor, so researcher delivered questionnaires were implemented to improve participation. Although these are more time consuming the reliability of results and completion of questionnaires is higher. A limited number of surveys were also conducted with a trail bike operator, Trail Rides Wales, in order to capture the off road segment. Following agreement with MAG, the researcher also attended the Aberystwyth Motorcycle Action Group Show in July, which attracted motorcycle tourists from many parts of the UK. Questionnaires were distributed as well as a supplementary section evaluating the event for the local group. In total 156 survey responses were collected and analysed. Online research was also be important due to the large number of 'bikers guides' and weblogs discussing routes and tourism advice. A wide range of background discussions was conducted with other organisations such as councils, tourism partnerships, accommodation providers, motorcycling operators, associations and clubs. These stakeholders are listed in appendix 3, and will be useful for those operating in this sector in the future.



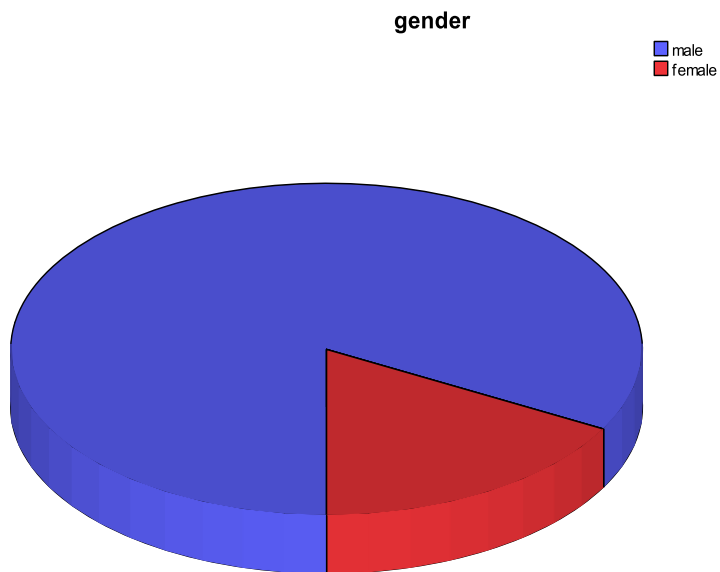
SIZE AND DEMOGRAPHICS OF SECTOR

There are about 1.4 million motorcycles in the UK. The 1.3 million licensed motorcycles in 2008 is some 45% higher than in 1999 and has more than doubled the numbers licensed in the mid 1990s. The MCIAs suggests there are 1.5 million active motorcyclists in the UK (around 3.1% of the adult population). There were around 57,000 motorcycles licensed in Wales in 2009, growing over 60 per cent higher than nine years earlier, in 2000, when it came to 35 thousand motorcycles. This can be compared with, for example, a 23 per cent growth in the number of cars licensed in Wales. We do know that there has been a shift to larger capacity motorcycles and an increase in the average age of motorcyclists, with 50% of all active motorcyclists now aged 40 or over (DfT, 2007). The demographics of this group has meant that, increasingly, motorcycles are used for leisure purposes rather than commuting. The lack of interest in the motorcycle tourism sector may be due to a perceived image of rebellious youthful bikers which is at odds with their current demographic.



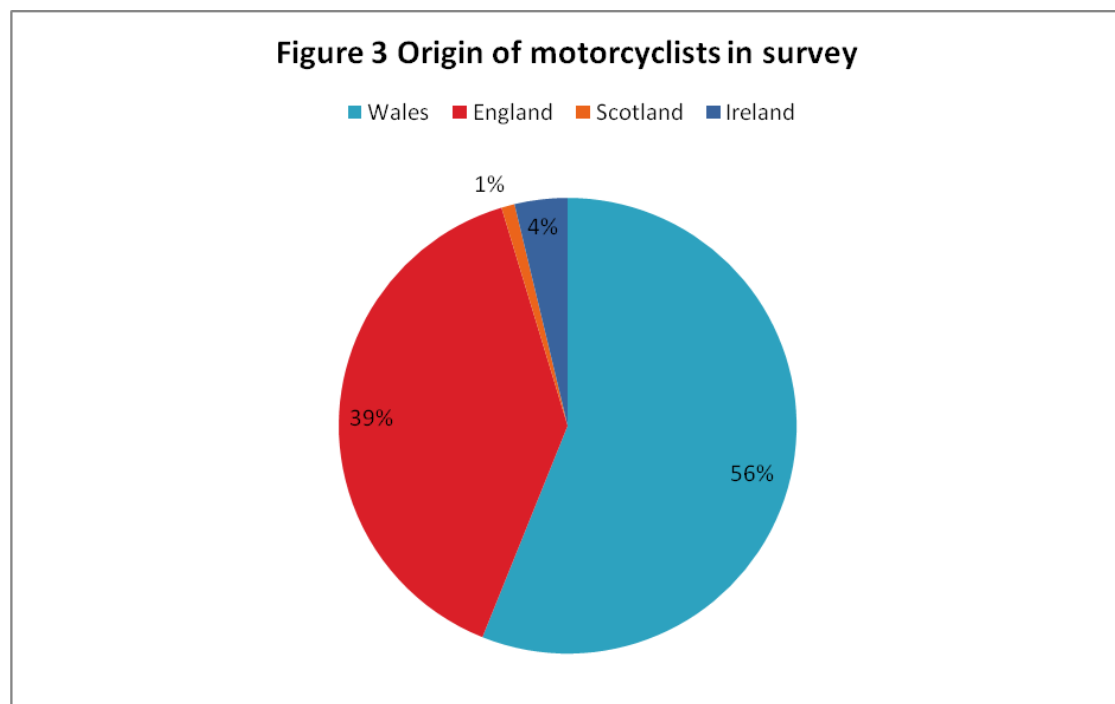
Indeed, motorcycle tourists in the survey were typically older and male. Over 80% of the sample were over the age of 35, and over half were over 45. The largest age group was 45-54 years of age, illustrating that the motorcycle tourism market is older and likely has more

time and more money to spend on this pursuit. Although the activity is still dominated by male participants the most significant growth in motorcyclists has been in female riders.



There are now over 525,000 female motorbike license holders in the UK (MCIA, 2008). Indeed, although the majority of motorcycle tourists in the survey were male, a significant proportion were female, making up 17% of the sample.

As could be expected from the survey location, over half of respondents were based in Wales, but it is notable that almost 40% of those answering the survey were from England. Given that survey locations were all in west Wales, this does demonstrate the attraction of Welsh roads and landscape to English bikers. Although there were no non-British bikers recruited in this survey, observation does indicate that the country is popular with bikers from the continent, particularly from the Netherlands and Germany. There is a need to increase the marketing profile to these markets.



Postcode information was collected from survey respondents and this is plotted in figure 4. As can be seen from the map, motorcyclists travel a considerable distance to access the roads of mid Wales. Although there is a significant cluster of local motorcyclists, there are also significant clusters in the West Midlands, the North West, Bristol and the Welsh Valleys. Some motorcyclists came from further afield such as Kent, Essex, the New Forest, Devon and Ireland.

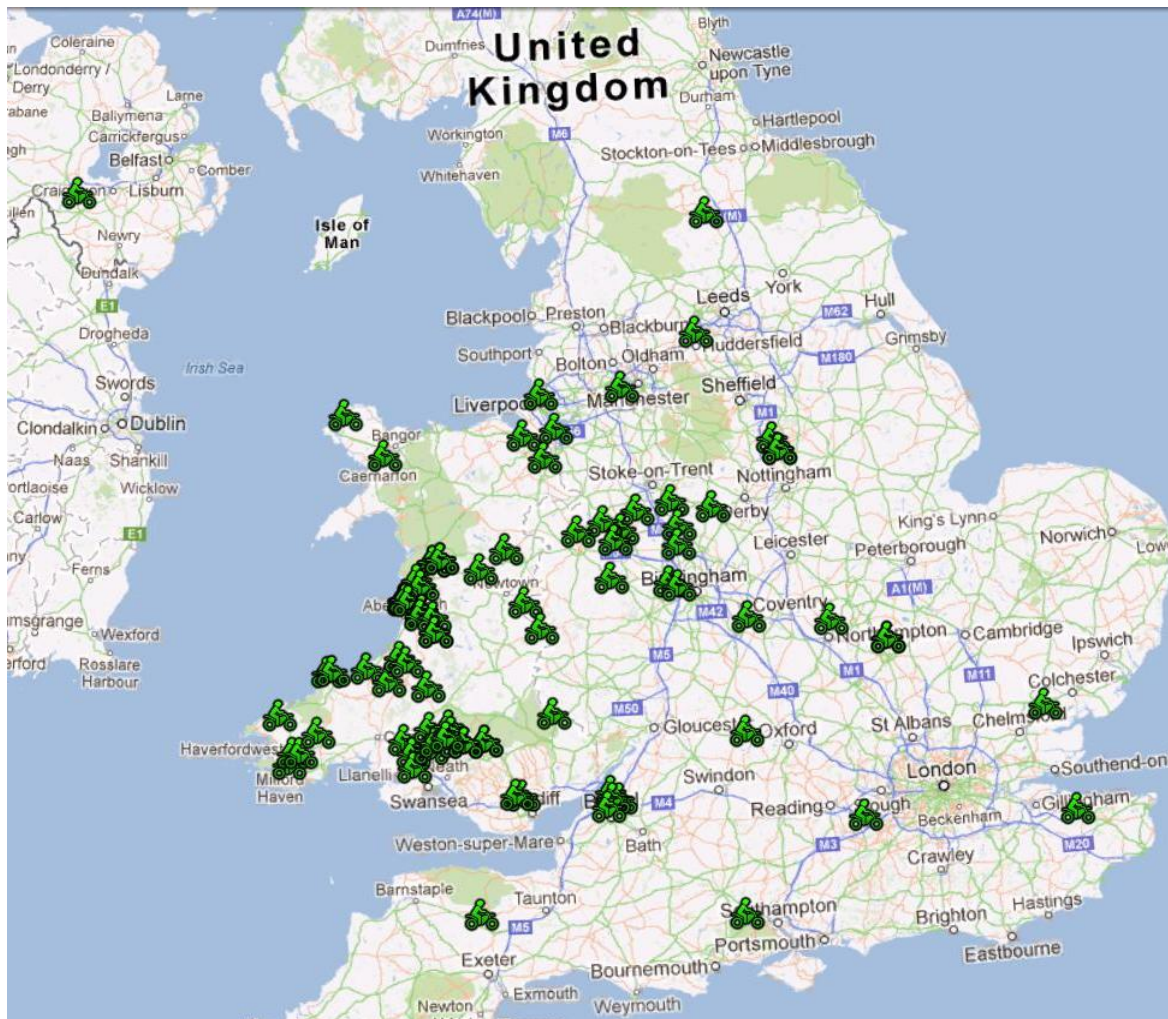


Figure 4: Origin of Motorcycle tourists.

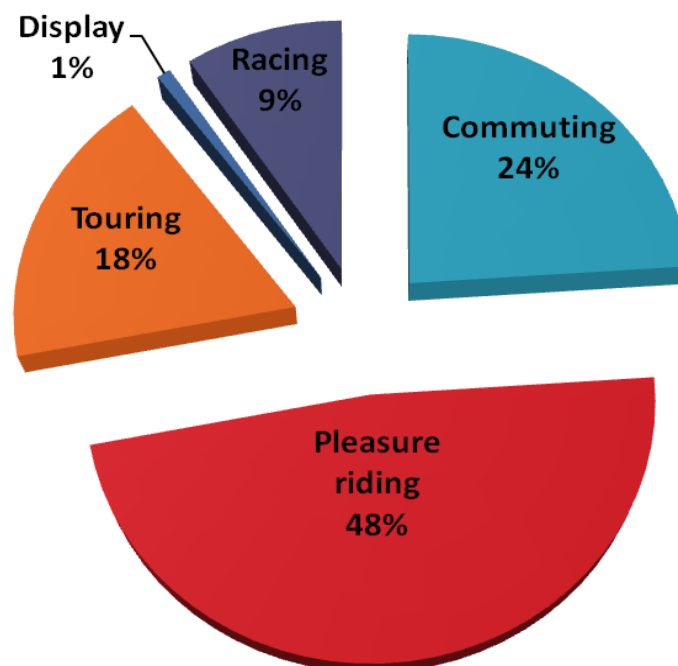
MOTORCYCLE TOURIST BEHAVIOUR

The average mileage covered by motorbike owners in the survey was 6452 miles in a year, with sixty percent covering over 5000 miles or more a year, and nearly quarter 10,000 miles or more a year. Almost 30% of motorcycle owners owned more than one motorcycle.

The MCIA report suggested that more than half of motorcyclists do not use their motorcycles for any form of tourism activity. A third use their motorcycles for day trips, 22% reported using motorcycles for short (weekend) breaks, while 10% use their motorcycles to take longer holidays.

However, the strong leisure and tourism orientation of motorcycles is demonstrated by their percentage use in this survey. When asked the relative proportion of time that these vehicles are used for commuting, pleasure, touring, display and racing, there was a dominance of recreational use, with motorcycles on average only being used just over a quarter of the time for commuting purposes. Of the remaining time, motorcycles were used in the main for pleasure riding over half of the time, and were used for longer touring about twenty percent of the time. A small, but significant proportion were motorcycles used for racing purposes at track days or other events (11%). The greater tourism orientation of this survey may be as the research was conducted in a tourism location, so one would expect a higher leisure orientation for these users.

Figure 5: Average proportions of motorcycle use by purpose



Although a significant number of respondents were travelling alone, the majority of motorcyclists were travelling with other motorbikes. Nearly a quarter of motorbikes were in groups bigger than five. This emphasises the social aspect to motorcycling and the significant multipliers that may be considered when looking at expenditure. However, it does also highlight a potential issue of motorcyclists travelling in large groups, which may bring them into conflict with other road users.

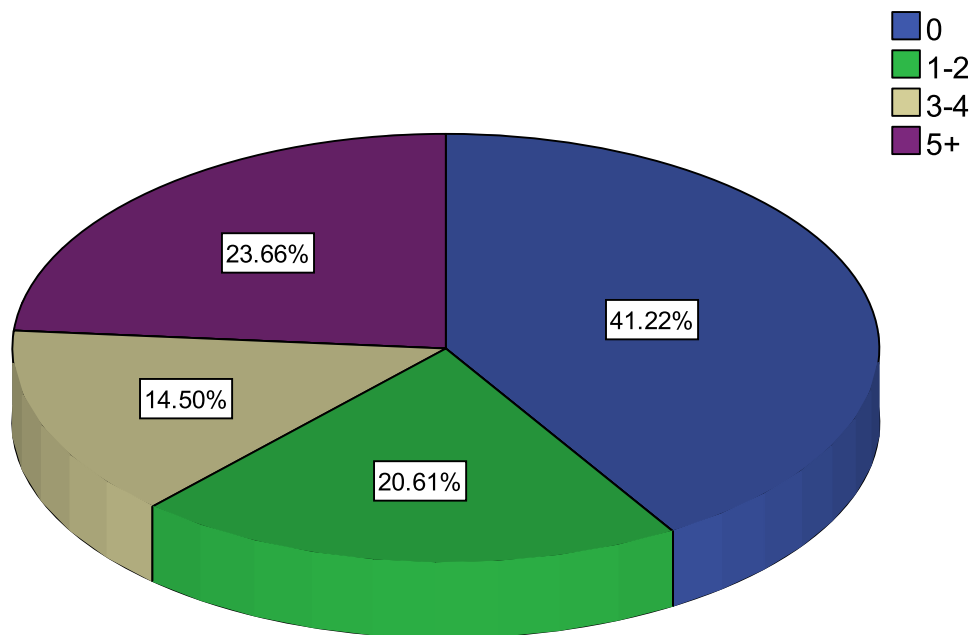
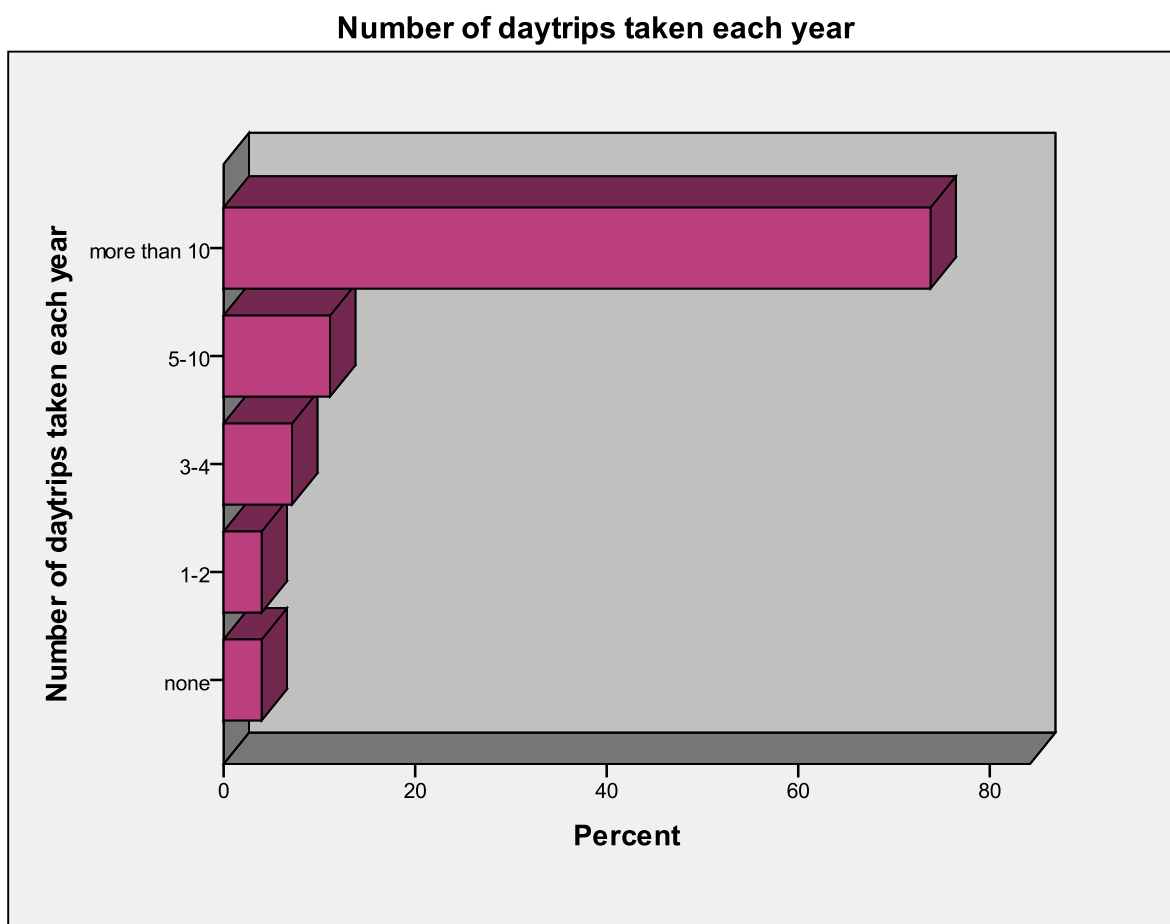


Figure 6: Respondents size of motorcycle group

Furthermore, many motorcyclists carry passengers. Although only about half of motorcyclists carried a pillion passenger at all, those who did were on average carrying a passenger approximately almost half (44 percent) of the time.

Previous research has suggested that the average motorcyclist in the UK spends at least 4.5 days per annum taking tourism-related motorcycling trips, equating to 6.7 million tourism days in total (MCIA 2010). This study confirms that motorcycle trips play a central part in the leisure time of owners. Of those who own a motorcycle the vast majority in this survey take over ten day trips per year. Those who do not were owners of classic motorcycles that they would only use on short trips.

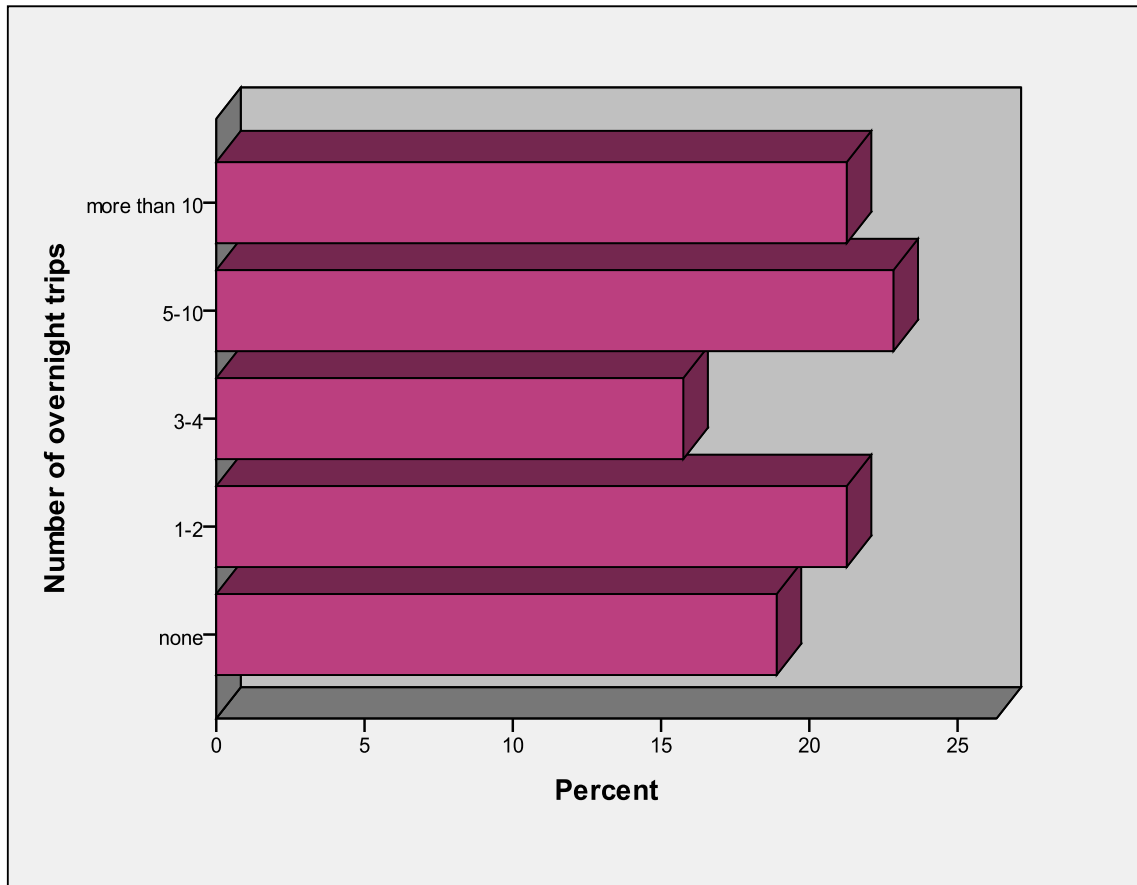
Figure 7



There was much greater variation in the number of overnight trips, as shown in figure 8, with a fifth of those not making overnight stays at all, but some motorcycle owners taking over ten overnight trips. A conservative estimate would therefore suggest that on average, the number of overnight trips taken by motorcycle by owners was 4.7 trips per year.

Figure 8

Number of overnight trips



Motorcyclists were well travelled, with almost half of bikers having taken an overseas trip by motorcycle. For reasons of proximity, France, Italy and Spain were the most popular destinations, but some motorcyclists had been to more exotic destinations such as the Arctic Circle and Black Sea on two wheels. Around 100,000 independent riders from the UK take tourism-related motorcycling trips abroad each year, compared to 23,000 international riders visiting the UK (MCIA 2010).

Have you travelled overseas on a motorcycle?

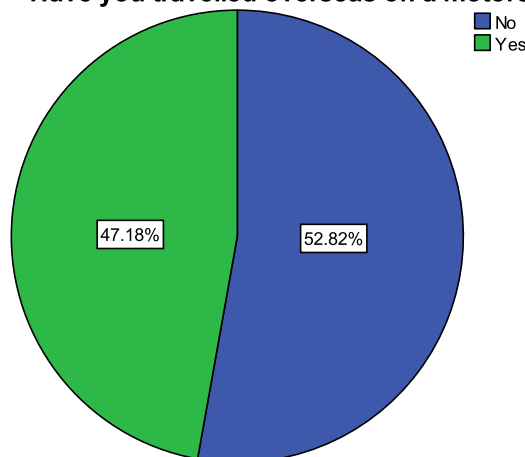


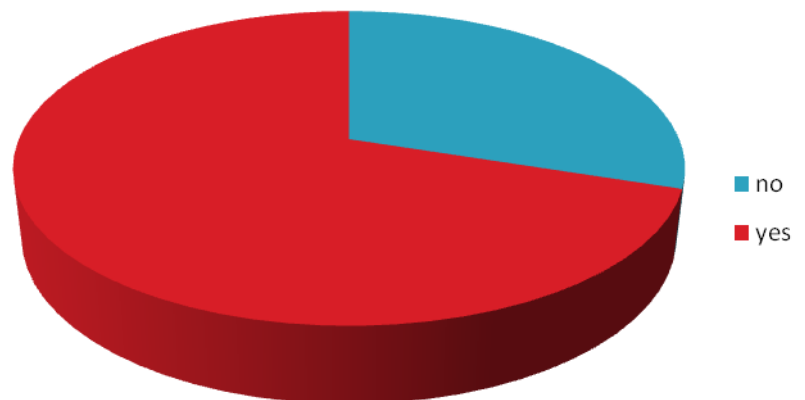
Figure 9

INFLUENCES ON TRIP BEHAVIOR

As motorcyclists are a close community with orientation towards social factors, many are members of motorcycling organisations. Of this group, 41% were members of a motorcycle organisation, either a local club, a national or bike specific club or the Motorcycle Action Group.

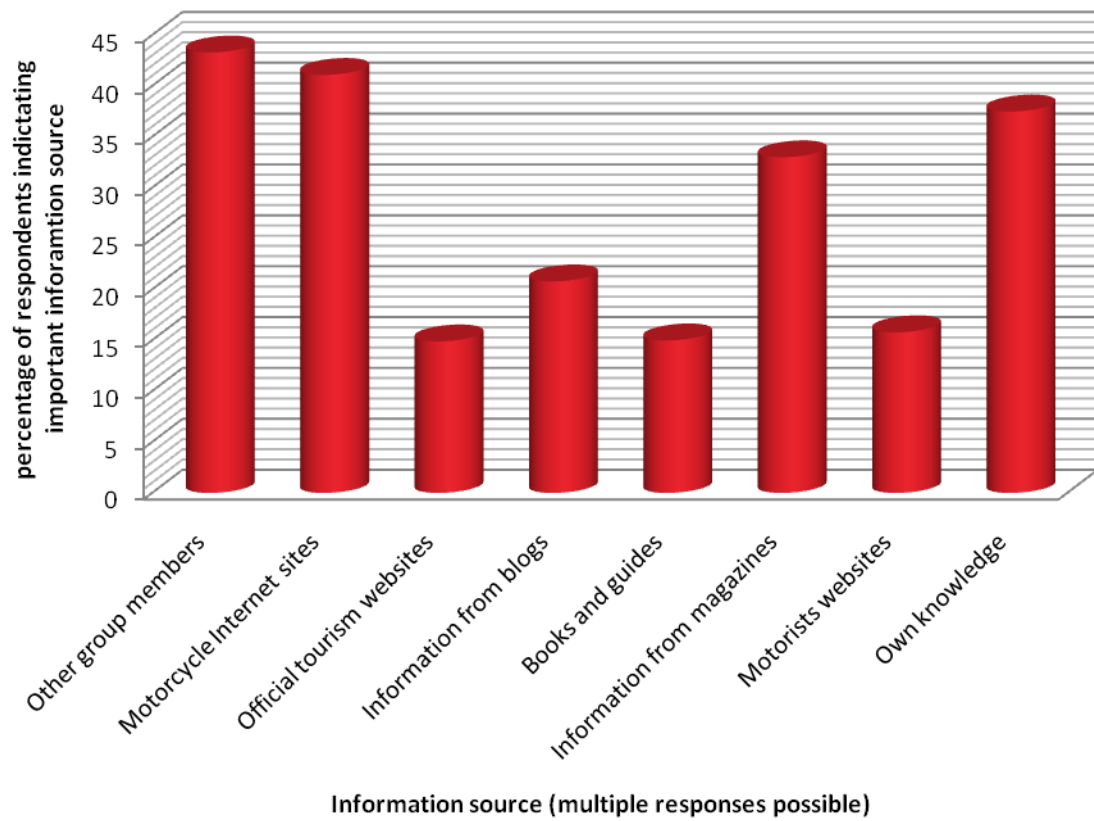
Figure 10: Do you read motorcycle magazines?

Seventy percent of respondents read motorcycling publications, the most popular of these being *Motorcycle News (MCN)*, which was regularly read by 30% of the sample. Other popular magazines were *Bike*, *Ride*, *Fast Bike*, *100% Bike*, *Backstreet Heroes* and *Motorcycle Monthly*.



Motorcyclists use a variety of information sources when planning their trips as shown in figure 11. The social nature of motorcycling was an important source with nearly half of respondents using information and recommendations from other group members. Prior knowledge was also an important source of information, with a significant proportion of respondents indicating that this was how they planned their trips, highlighting the biker preference for self-sufficiency. The internet was an important information source, but the nature of this search was quite targeted. Again bikers seemed to trust other bikers, with a preference for websites that were specific to the motorcycling fraternity, and were also significant users of online weblog and discussion boards. There was less use of official tourism websites, which may indicate that specific areas for this segment on the *Visit Wales* site are not necessary. Motorcyclists also made limited use of general motoring websites, presumably mainly for travel information and route planning. Another important information source, as already highlighted, is motorcycling magazines, which were used by over a third of bikers to plan their travel. Magazines are therefore an important channel for marketing motorcycle tourism products.

Figure 11: Sources of information used when planning a motorcycle trip



MOTORCYCLE DESTINATIONS

This project is primarily about providing better intelligence to allow destinations to develop their motorcycle tourism product. There are two competing destinations which have engaged in this market in Scotland and Northern Ireland, both with LEADER funding. The Northern Ireland project identified the importance of road quality, good signage and scenic stopping places for motorcycle tourists.

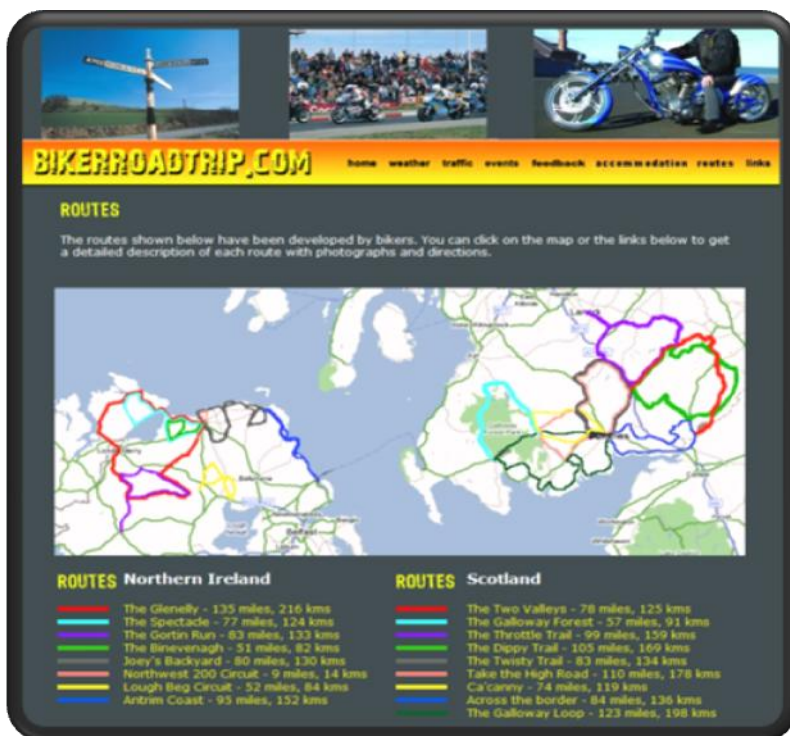
MOTORCYCLE SCOTLAND PROJECT

This project aimed to promote Dumfries & Galloway as a motorcycle touring destination, and received £23,000 of LEADER funding. The vehicle for this project is the development and marketing of a route based website at www.motorcyclescotland.com. This lists biker friendly businesses in southern Scotland and aims to increase the value of motorcycle tourism to the region, targeting UK and international bikers. There are also advice on green biking and links to carbon offsetting schemes. They also aim to increase the benefits to Bikers, through discounts and signposting to biker facilities; to make the website sustainable and raise additional income for its further development including

implementation of an E-newsletter; to attract both UK and international visitors by targeting ferry companies and motorcycle clubs and specialist travel agents; to increase the number of motorcycle tourists staying overnight at biker friendly accommodation and spending money in the Region.



Route advice on Motorcycle Scotland website



Route advice on Bikeroadtrip (Northern Ireland/Scotland) website

However, destinations need to be wary of creating a negative biker image. There are many reports of North Wales suffering from a bad image in terms of unreasonable policing, and bikers feeling unfairly targeted. Aberystwyth has had an ongoing issue of parking provision for motorcyclists on the promenade. The seafront is a very popular destination for motorcyclists, as it has catering facilities, and a large open area where many bikes can congregate at the end of a ride. However, this has brought conflict with other users, prompting the council to regulate parking provision in 2011. Some initial reports indicated that motorcyclist visitors were either put off from visiting the town, or are not complying with the new regulations (Cambrian News, 2011). The trial of a motorcycle parking area on the promenade has been extended until September 2012. However, most visiting motorcyclists that we spoke to expressed that they



were very happy with the new parking arrangements. Problems only occurred when the parking area was encroached by other users, for example the users of the bandstand.

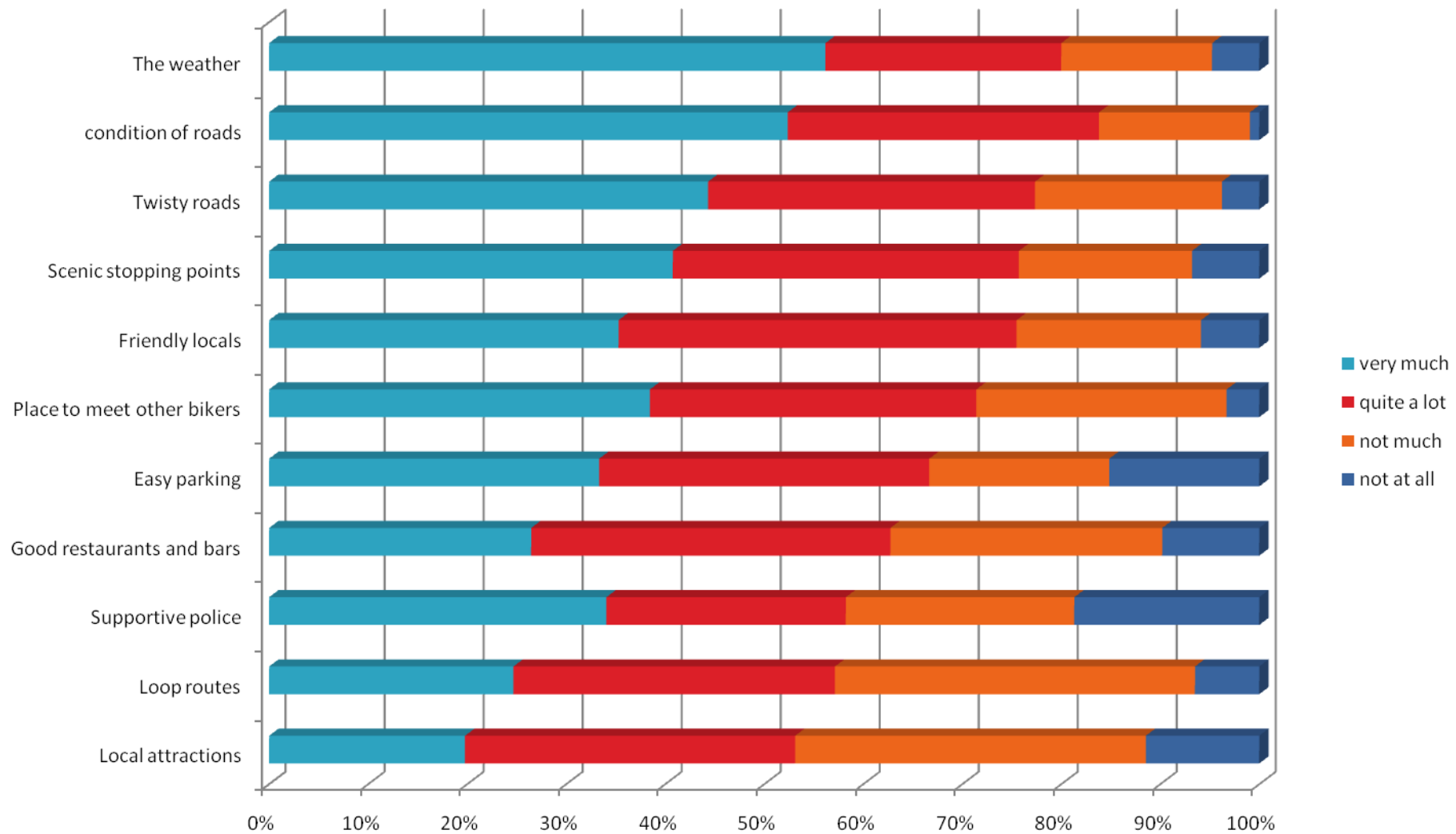
Motorcyclists answering the survey indicated what factors they deemed important in choosing a destination to visit on their motorcycle (these are displayed in figure 12). The most important factor (which destinations have little control over!) was that of the weather, as clearly motorcycling is more enjoyable in good weather. Similarly a presence of twisty roads, with sweeping bends that are favoured by motorcyclists, was another desired factor largely out of control of the destination. However it is worth noting that destinations that do have these attributes do possess a competitive advantage in these areas. Whilst Wales may not score on the former, it does have a significant proportion of the latter, which is perhaps one of the major reasons why large numbers of motorcyclists visit the country.

Factors which may be influenced by destinations, and particularly local councils, are the condition of the roads, which was noted as very or quite important by 84% of respondents, scenic stopping points which were important to 76%, and easy parking which was important to 67%. The latter are particularly important to motorcyclists as one of the other highly ranked attributes was a place to meet other bikers, with over 70% indicating this would be important in their choice of destination. As mentioned previously motorcyclists are a close but socially oriented segment, who like to chat to one another and look at each others motorbikes. Much of this may also take place in restaurants and bars in the destination, and the presence of good establishments was important to over sixty percent of motorcyclists. The economic impact on this sector is mentioned later in the report.

It is also important that the local community feels welcoming to motorcyclists, although it is recognised that this must be a two-way process with equivalent respect of local residents and other user groups by bikers. Within this is a good relationship with the police who are supportive of safe motorcycling activity. Although a significant proportion did indicate an interest in loop routes which would start and end in the same destination, these were ranked lower in the hierarchy. Similarly other local attractions were not deemed to be the main reason for travelling to a destination. However, a significant proportion are interested in other activities to do when taking a break from riding, so there is potential for attraction operators and activity providers to consider this in their marketing.

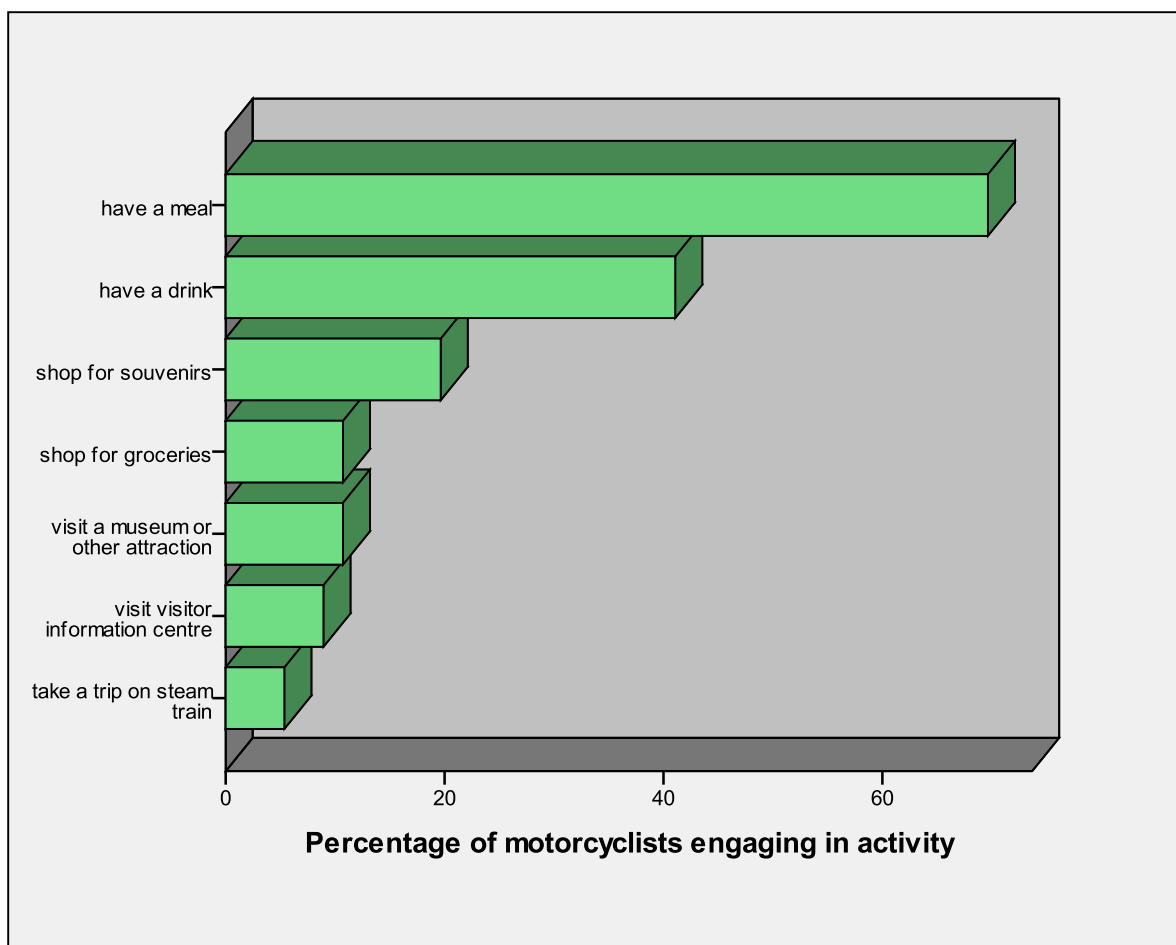
Other attributes that were also mentioned by respondents were the presence of garages and main dealers for any maintenance requirements to the vehicle. Bikers, like other tourists liked to visit the seaside, which gave them a purpose, to their ride. As mentioned it was important that bikers had good places where they could stretch their legs and get refreshment and sustenance.

Figure 12: Importance of factors in choosing a motorcycling destination



As motorcycling is the central activity, less emphasis is given to other activities when visiting destinations. The main additional activity that motorcyclists surveyed were engaged in was refreshment, with three quarters of respondents also having a meal (and a drink), and half having a drink only. The high proportion of those wanting food illustrates an important opportunity for hospitality outlets. Lower numbers of respondents engaged in shopping for either souvenirs or groceries. A limited number of respondents, those on extended tours visited in more tourist activity, seeking visitor centres and visiting museums or other attractions or taking a trip on a steam train.

Figure 13



MOTORCYCLE HOSPITALITY AND FACILITIES

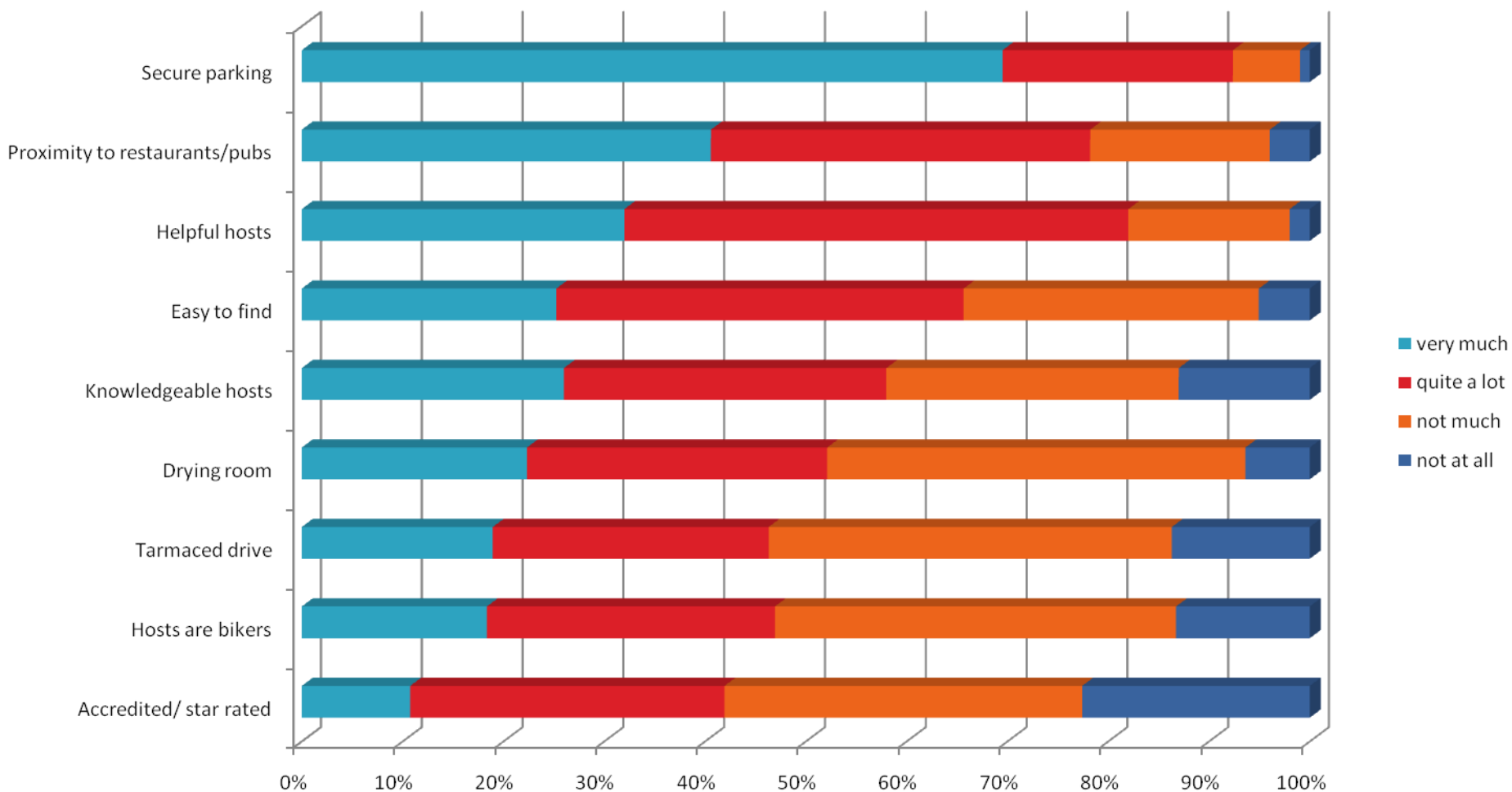
Given the specialty nature of motorcyclists, many hospitality providers have found it useful to deliberately target this market. For example the Ponderosa Cafe Complex is a famous meeting place for Motorcycle enthusiasts in Wales. Surrounded by the roads of North Wales to ride, there are often all types of bikers here from new young riders to born again bikers, Cruisers, Tourers, Customs, Trailies, Sports, brand new and vintage. The venue deliberately courts the biker market, and even has a 'bikers breakfast' on the menu.



There is also scope for accommodation providers to target this market. In the survey we asked motorcyclists to indicate which attributes of accommodation would be important to them in choosing an establishment. The most important attribute by far was secure parking for their motorbike, which 92% felt was very important or quite important. As mentioned previously bikers have a high degree of attachment and pride in their vehicle, so the security of this is paramount. Host factors were important, particularly in relation to being helpful to the individual needs of motorcyclists. Knowledge was slightly less important, pointing to the self-sufficiency of motorcyclists, and it was not important to the majority of bikers that hosts were motorcyclists themselves (although a minority would be interested in this). Also of importance was the accommodation being easy to find, as using maps and satellite navigation is difficult on a motorbike. Of high importance was that accommodation was close to restaurants and pubs, as once bikers are finished riding for the day they would prefer to be able to walk to any eating establishments. A drying room and a tarmaced drive were not seen as essential, but about half of respondents would be interested in these. Accreditation and star rating of establishments were not deemed as important to this particular segment.

Some other accommodation attributes were also mentioned by respondents. There was a preference for clean establishments and those that had good showers and bath facilities, due to the often cold, dirty and tiring experience of motorcycling. A degree of interest in camping facilities was indicated and bikers did indicate a preference for good value accommodation. However a couple of respondents did mention a preference for high end accommodation, so there may be a market niche in high standard motorcycle oriented products. Overall bikers were keen to stress that they would often use establishments recommended by other bikers, showing the close knit nature of this community. The most important was that accommodation was seen to be 'biker friendly' and would not portray a feeling of being unwelcoming to the specific needs of these tourists.

Figure 14: Importance of factors in choosing accomodation when motorcycling



The following advice for Biker accommodation was developed by Visit Scotland for the Bikers Welcome Scheme:

USEFUL TIPS FOR ACCOMMODATION PROVIDERS

- 1** Display a positive attitude towards bikers and a genuine desire to meet and anticipate their needs.
- 2** A separate space should be available for drying outdoor clothing and footwear at an ambient temperature so clothes can dry overnight.
- 3** You should have a supply of recommended tours including Viewpoints, Visitor Attractions etc available for reference.
- 4** Visor cleaning/boot-cleaning facilities, this would mean keeping visor spray and soft cloths, black boot polish and brushes etc. Degrease handwash should be available to guests.
- 5** Wash down facilities for motorbikes should be available for guests' use.
- 6** Details of local garages and shops specialising in motorbikes. Information on location and opening times of local petrol stations and opening hours.
- 7** Motorbike books and magazines, consider motorbikers' logbook for guests to record day trips.
- 8** You should provide safe storage for motorbikes. Hard standing for motorbikes.
- 9** Daily and weekly Met Office information (or similar) should be available as well as travel and road information.
- 10** Display Safe Biking information where readily available.

FOR SERVICED ACCOMMODATION

- 11** Hot or cold drinks should be available on arrival. An early breakfast should be offered from 7.00am or for very early leavers a tray the night before.
- 12** You should be able to offer a packed lunch or filled flask if required.
- 13** You should be able to offer a late evening meal (available until 8.00pm) if there are no other meal providers within one mile, or transport to the nearest restaurants. A late night snack should be offered after 8.00pm.
- 14** Information on location and opening times of nearest local late opening eating establishments (and directions), if meals are not provided.

FOR SELF CATERING ACCOMMODATION

- 15** Flasks and cups.
- 16** Information on location and opening times of nearest local late opening eating establishments (and directions), if meals are not provided.

MOTORCYCLE EVENTS

There is significant scope for events based on motorcycling. These may be sports events, bike shows and displays, or rallies for motorcycle enthusiasts. The former tend to be larger high profile events, whilst the latter are often organised by clubs and associations. There are a large number of UK organisations that arrange motorcycle shows, rallies, rides and other tourism activities including: the British Motorcyclists Federation (BMF); the Motorcycle Action Group (MAG); and many national and regional owners and riders clubs associated with the different motorcycle manufacturers (MCIA, 2010).

The centrality of motorcycling to this sector is demonstrated in the popularity of motorcycle events, which do attract motorcyclists to visit destinations, and offer bikers the opportunity to meet like minded individuals. Over three quarters (76%) of those surveyed had been to some form of motorcycle event in the past year. These included motorcycle races, motorcycle rallies and club events, classic or custom motorcycle shows and new motorcycle show such as that held at the NEC. The importance of the Isle of Man TT as a 'must do' on the motorcycling calendar is shown by the fact that some 16% of respondents had visited the race.

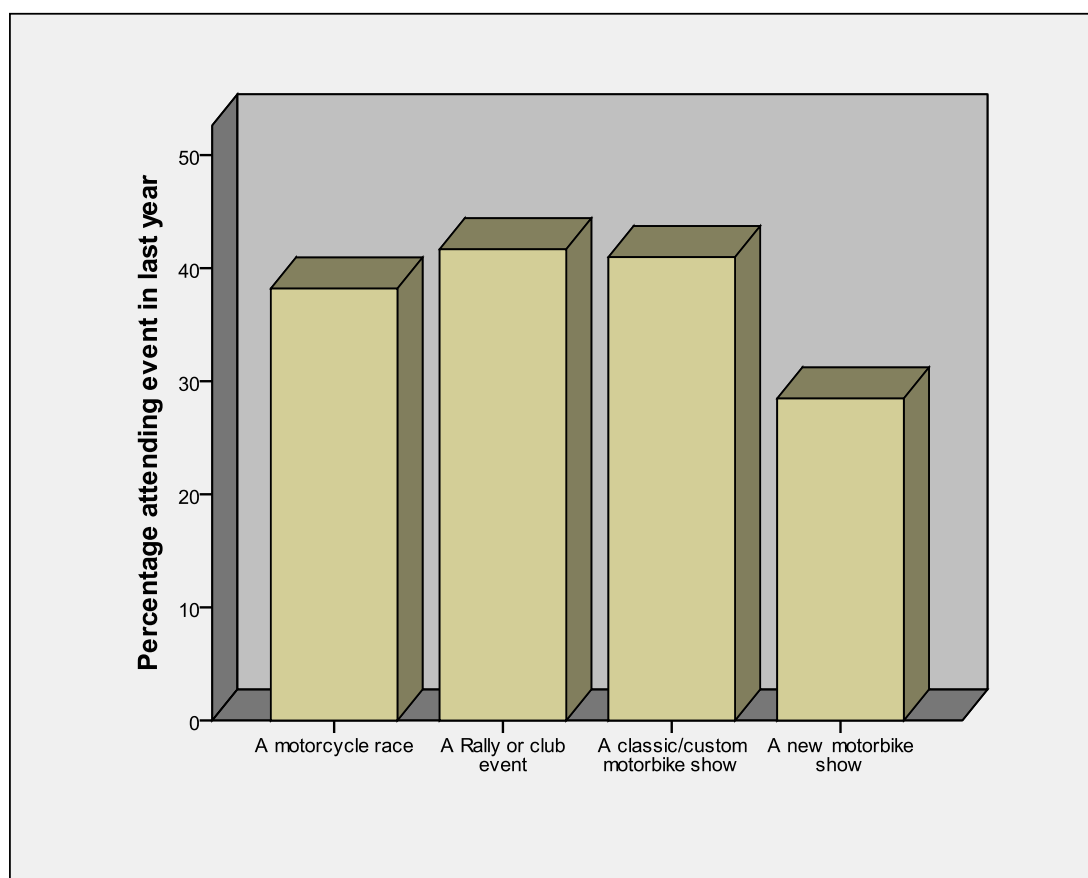


Figure 15: Attendance of survey respondents at motorcycle events in past year

Some examples of motorcycle events are included below:

MOTORCYCLE RACING ON THE ISLE OF MAN

The Isle of Man is renowned across the world for its motorsport events which have been attracting visitors for more than 100 years³².

Events include the TT Races, Pre TT Classic, Southern 100, Billown TT Races, Manx National 2 Day Trial, Manx Grand Prix, the Manx Classic Weekend Trial, the VMCC Rally and, more recently, the TTXGP. The TT races have been running since 1907, when the Isle of Man was chosen due to its



seemingly lax laws on racing on public highways compared to mainland Great Britain. The events remain popular and the 2007 event attracted some 60,000 visitors and is estimated to have contributed £48 million to the Isle of Man economy. The Isle of Man Government is currently undertaking research to provide an up to date assessment of the contribution of motorsport to the island economy. To date, the only findings relate to the 2009 Manx Grand Prix, which attracted more than 8,000 visitors (some from as far as Australia), each of whom spent around £550 during a week-long visit to the island on average, contributing £4.4 million to the local island economy.

THUNDERSPRINT

The annual Thundersprint event takes place on the May Bank Holiday weekend in Northwich in Cheshire and is one of the largest motorcycle events in Europe. This free event started in 2002 and provides an opportunity for attendees to see classic, custom and race bikes, meet the stars of the racing world, purchase motorcycle products, attend seminars and gain information on everything related to motorcycling. The event aims to widen the reach of motorcycling, offering free admission and a family friendly environment. A study undertaken by the North West Development Agency (NWDA) suggests that the 2009 Thundersprint event attracted 145,000 visitors, more than 75% of whom were from outside Cheshire, while visitors from outside the North West region accounted for almost 25%. The research estimated average expenditures associated with the event to be around £37.50 for visitors and more than £108 for participants. The total net economic impact for the region was estimated to be approximately £4.4 million.

EUROPEAN BIKE WEEK 6-11TH SEPTEMBER 2011, FAKKER SEE, AUSTRIA

Europe's biggest bike festival, catering mostly for Harley-Davidson owners, this festival attracts over 100,000 and more than 70,000 motorcycles. With parades and expos this festival caters to the high level of customisation characteristic of the Harley Davidson brand. However it is marketed as a chance to visit Austria and to 'descend on the region to experience the stunning mountainous scenery, great biking roads and to party, style!'



NO BULL; JUST BEER & BIKES SHOW PENMAENAU BUILTH WELLS (AUGUST 24TH - 27TH 2012)



**No Bull
3rd
Just
Beer & Bike
Show**

Proud to be associated



First 200 pre booked free badge

27th-28th-29th-30th May 2011
PENMAENAU FARM, BUILTH WELLS

BANDS: Celtic Pride: AC/DC UK: Self Titled : Conspiracy Theory:
Slack Jaw: Panic Station: The Cruise plus more to be confirmed
Bike and Trike Show (Secure undercover area)
Trophy for largest club turn out
Silly Competitions
Rock Disco
Trade Stands
100ft water slide
Free Tractor Tom ride to Builth Wells
Late Bars, Huge indoor venue, posh toilets & showers
Back Patch By Prior Arrangement Only
Tickets cost just £15.00. Pre book up until 48hrs prior to gates open.
Tickets on the gate £20.00. Parking for cars and/or vans for weekend
£10.00 - we have acres of parking space.
Disabled Badge holders Vehicle Free. Entrance is free for children
under the age of 14, as long as they are accompanied by an adult.
Penmaenau Events Ltd, Llanelwedd, Builth Wells, Powys LD2 3RD
TEL: 01982 553886 / 01982 553920 ANN: 07970 898005 all subject to availability
www.penmaenauevents.co.uk

This show, now in its fourth year, is held on the outskirts of Builth Wells on the A470, surrounding the Royal Welsh Show Ground. Penmaenau has been in operation as a caravan and camp site for over thirty years and hosts many niche events. Run by ann and her two sons, Gareth and Gwyn, the site has expanded dramatically during the last five years. The No Bull; Just beer & bikes show has live music, catering a bike show, and bike competitions.

MOTORCYCLE ACTION GROUP ABERYSTWYTH SUMMER SHOW JULY 23RD 2011

This local show in Aberystwyth attracts visitors from all over the UK, and is held at Aberystwyth Rugby Club each July. Attendees are able to camp on Friday & Saturday and enjoy music by live bands, visit the Trade Stands, enter competitions and gain trophies for *Rat Bike; Chopper/Custom; Trike; Best of British; Classic; Bog Standard; and Spirit of Motorcycling*. Both days include a group rideout, to the surrounding countryside of mid-Wales.

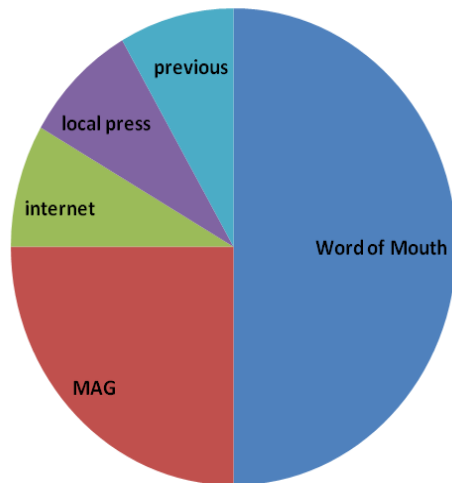


Figure 16
How did visitors find out about the MAG show 2011?

Respondents found out about the event primarily via word of mouth or through the Motorcycle Action Group.

Respondents also rated various attributes of the event. They were most satisfied with the entry price (only £5) and the camping facilities. The number and diversity of stall holders could be improved in future years. This feedback has been communicated to organisers of the event.

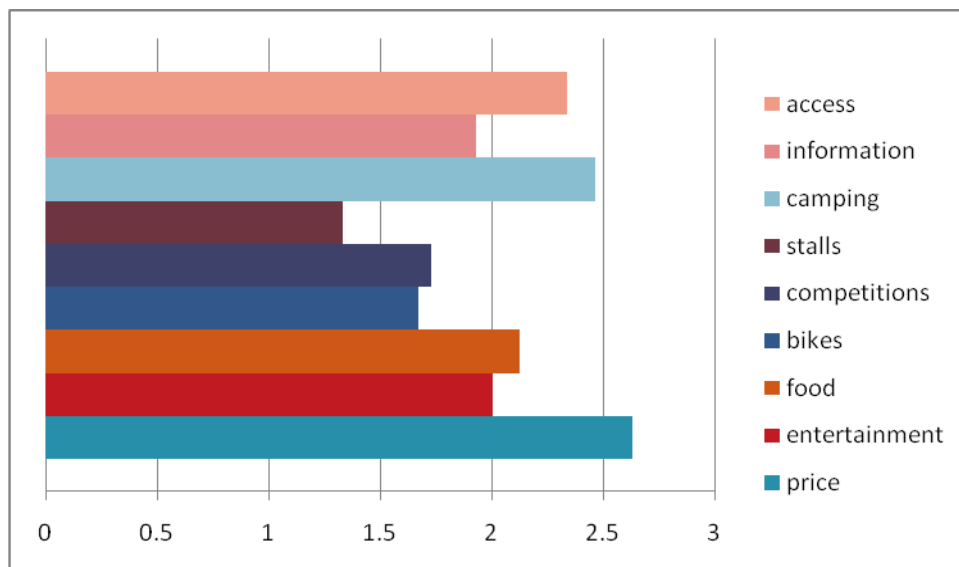


Figure 17
Ratings of MAG show 2011

3= Excellent
2= good
1= okay
0= poor

MOTORCYCLE TOURISM OPERATORS

The majority of tourism operators in the motorcycle sector specialise in the provision of overseas motorcycle leisure tours, which involve significant expenditures on overseas goods and services (such as hotels, food and drink and fuel). Imports are assumed to be 40% of turnover to account for these overseas purchases, based on information provided by industry representatives and survey responses. Exports are assumed to be 10% of turnover to account for overseas tourists using UK tour operators to book motorcycle leisure tours. The export figure is lower to allow for the fact that more UK motorcycle tourists travel abroad compared to the number of overseas motorcyclists visiting the UK (MCIA, 2010).

GLOBEBUSTERS – PROVIDER OF ADVENTURE MOTORCYCLE EXPEDITIONS, YSTRADGYNLAIS, SOUTH WALES.

GlobeBusters was founded in 2002 by Kevin and Julia Sanders when they set a new world record for circumnavigating the world by motorcycle in just 19½ days. This was followed in 2003 by a second world record for riding from Alaska across North, Central and South America to the south of Argentina in 35 days. This 'Trans Americas' route was then repeated



in 2005 as the first GlobeBusters motorcycle tour, taking a 'more leisurely' 19 weeks. A successful business has since been built around organising and delivering tours to many destinations across the world, including Africa, Asia, and the Americas. It has achieved significant growth and has a current turnover of £500,000. It employs three full-time staff at its base in South Wales and another six

freelance and support riders and staff to help deliver the tours as required. GlobeBusters delivers a range of tours involving different locations and durations, from ten days to 20 weeks, and typically accommodates groups of between 8 and 18 riders. These substantial trips are usually booked a year or two in advance, can cost up to £20,000 per rider, and current levels of demand project significant future growth. Initial expectations that these were likely to be 'once in a lifetime' trips appear to have underestimated demand as repeat business is strong and 25% of customers have already toured with GlobeBusters.

TRAIL RIDES WALES

Trail rides wales is a small independent operator in Mid Wales taking customers on off road trails either on their own motorbike or one of the company vehicles. Trail riding takes place on unclassified county roads and byways open to all traffic with natural surfaces, often known as "green lanes", linked by tarmac roads. Participants need to hold a licence to ride motorcycles on public roads. The variety of green lanes in Wales make it well worth a visit, as clients encounter stream crossings, boulders, rock steps, hills up and down, tight corners, sweeping bends, ruts and muddy surfaces in green lanes long and short. Prices vary from £80 per day on customer motorbikes to £195 per day on company vehicles. Trail rides Wales offers a number of multi day packages for those interested in exploring mid Wales. Trail rides Wales operates a low impact policy in line with the Trail Riders Forum (TRF) and is attentive to other users of the countryside. Customers rated attributes of the business very favourably, with only some confusion over the meeting places in rural locations and the quality of the website.

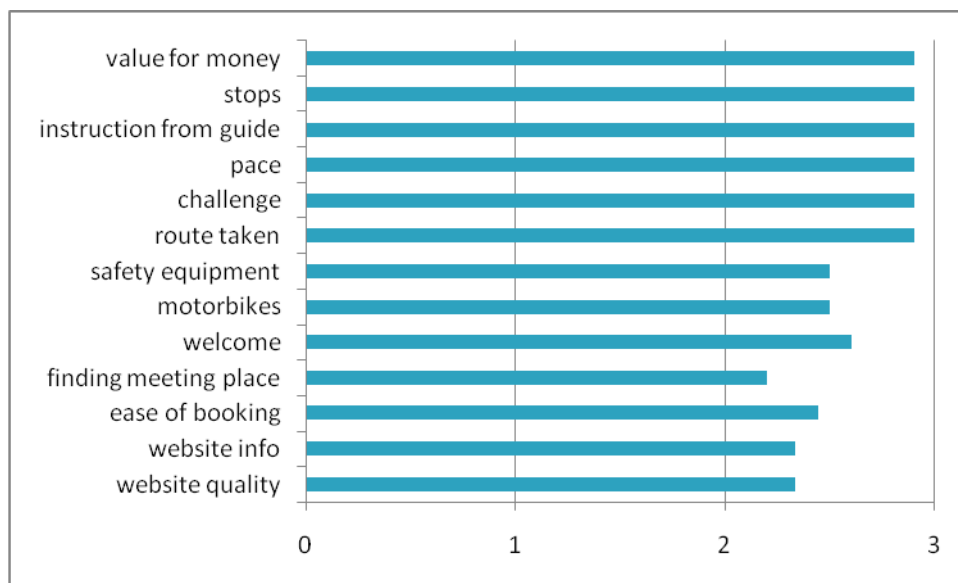


Figure 18 Trail Rides Wales customer evaluation. 0= poor, 3= excellent.

MOTORCYCLING TOURISM EXPENDITURE

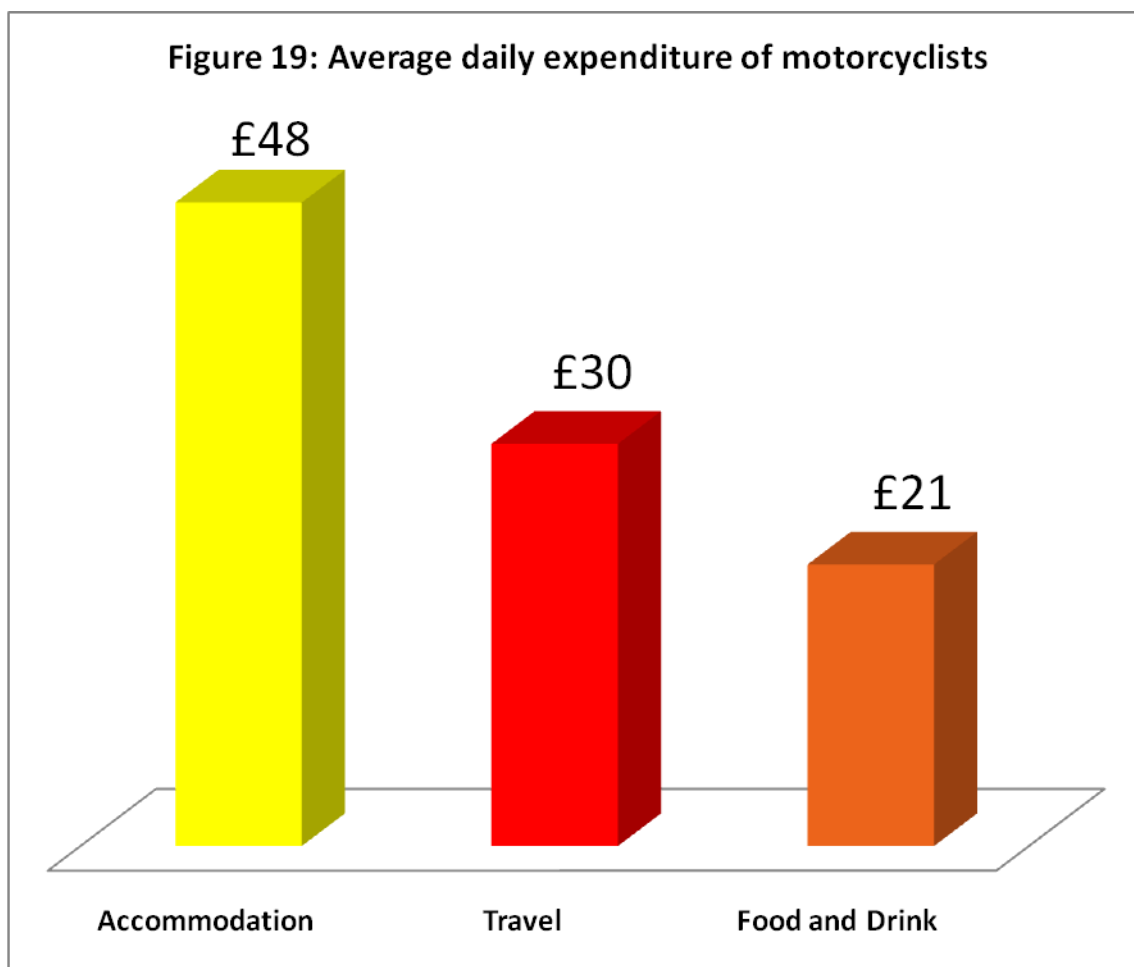
A survey in Broughton (2009) suggested that motorcyclists spend £430 per year just on motorcycle related accommodation. However, MCIA estimates suggest that average annual expenditure on motorcycle-related accommodation would be £270. This report estimated that motorcycle-related tourism expenditure in the UK is around £569 million, supporting approximately 13,250 tourism jobs (MCIA, 2010a). This report also suggests that Wales accounts for some 6.7% of this total at £38m or 890 jobs. However, the methodology in the MCIA survey was to split total expenditure by a similar ratio of total regional tourism spend. Given that rural Wales has a high proportion of the mountain and country roads favoured by motorcyclists and proximity to the large population centres of the Midlands, it is suggested that this spend is significantly higher.

Motorcyclists in the survey were asked to detail their current and planned expenditure on their trip. Bikers in the current survey were not particularly high spenders when it came to accommodation, as average expenditure on accommodation (for those travelling overnight in the survey) was £48 pounds per night.

The average expenditure on food and drinks per day was £21. This was predominantly on snacks and meals in cafes and pubs along the route at stopping points or at days end. Given the inability for motorcyclists to carry quantities of food or drinks with them much of this expenditure goes directly into the local economies through which motorcyclists pass.

As motorcycling is unusual in that the tourism activity is the mode of travel, average expenditure on travel is relatively high, despite the slightly better fuel consumption of two wheeled transport. Motorcyclists spent an average per day of £30 on travel, primarily on petrol for the motorcycle. Although some of this expenditure would take place at point of origin, limited capacity of fuel tanks means that again the majority of this expenditure would take place within host communities at local service stations.

In this particular survey there was limited expenditure on other items, but there was some mention of souvenirs and other activity expenditure.



Motorcycle tourists are therefore spending some £51 per day excluding accommodation and £99 per day including accommodation when they travel. If we estimate from above that the average number of day trips is 10 and the average number of overnight trips is 4.7, a conservative estimate of motorcycle related tourism expenditure is £975.30 per motorcyclist per year.

It is difficult to estimate the exact number of motorcyclists who do visit Wales for tourism purposes. However, using the results of the survey we can assume that approximately 76% of motorcycles in Wales are used for tourism and leisure purposes, which is approximately 42,000 vehicles. Given that a further 40% of visitors to Wales were from England (these number may be much higher in other regions) we can estimate that there would be at least 72,000 motorcycle owners active in Wales in or to any one year. Taking the estimate of annual expenditure we can assume that motorcycle tourism is worth at least £70 million to the Welsh economy per year, which is higher than the previous MCIA estimate. Although this is an estimate, knowledge of this sector would suggest that this is a lower limit, and total value to the economy is much higher still, particularly as no multipliers have been included in this calculation.

SAFETY IN MOTORCYCLE TOURISM

Road traffic accidents always dominate tourist accident statistics, for example in New Zealand between 1982 and 1996 27 percent of all tourist injuries were road traffic accidents (Bentley and Page 2000). There is a clear association in the public's mind between motorcycles and risk. Indeed the word that non-motorcyclists most associated with motorcycling was 'danger' (MCIA, 2010b). In 2009, 27 motorcyclists were killed on Welsh roads. Looking at the statistics a motorcyclist has a vastly higher chance of being injured relative to car passengers. The chance of a motorcycle rider being killed or seriously injured, per kilometre travelled, is around 54 times greater than for a car driver (WAG, 2009). However, it is important to note that despite increasing numbers of motorcyclists, improved safety campaigns and awareness has meant that current casualty levels in Wales are only a quarter of what they were in the 1980s (WAG, 2009).

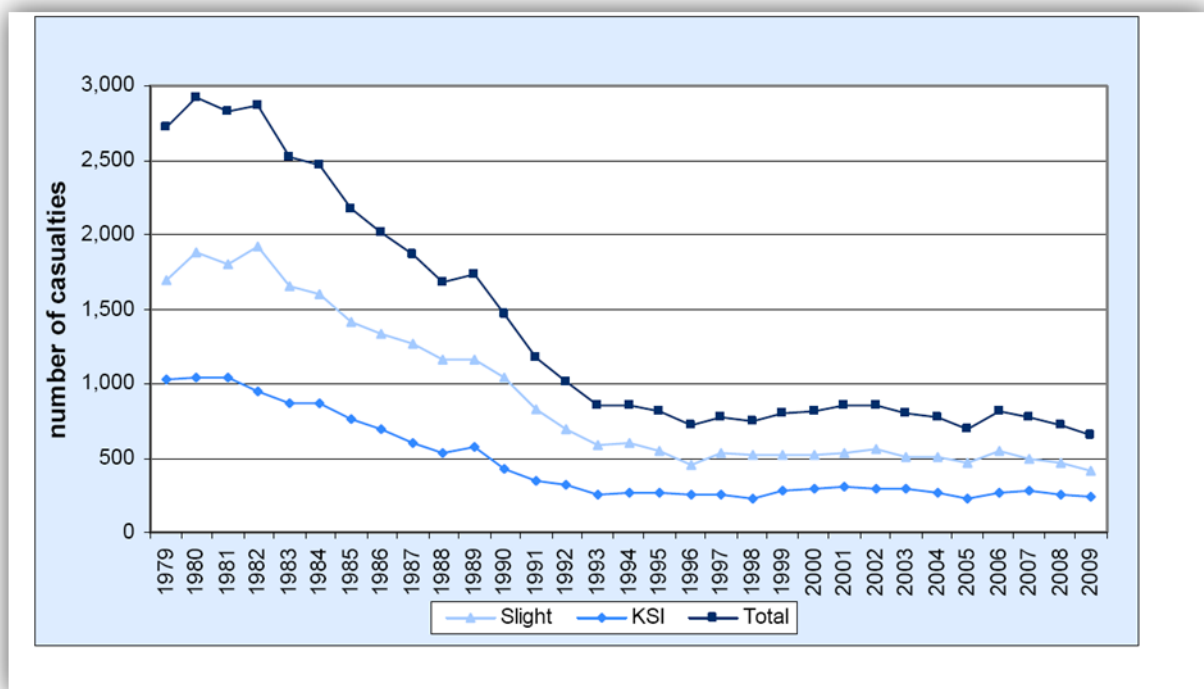


Figure 20 Motorcyclist casualties by severity (WAG, 2009)

This fall has been mostly in the under 30 age group, where casualties are a tenth of what they were in 1980, whilst those over 30 have been largely unchanged. Older age groups have increased in casualty rates, reflected in higher numbers of older bikers on the road. Indeed a coroner reporting on a death near Barmouth characterised motorcycling casualties as “middle aged men, usually from urban areas, riding high powered motorbikes,

crashing on left-hand bends after going too fast to take the corners and on roads that they were not familiar with” (Cambrian News 24 February 2011).

Larger motorcycles are inherently more risky, with vehicles over 500cc making up 58 percent of all injuries and 71 percent of all killed or seriously injured. The links between tourism and leisure use of motorcycles is shown by when casualties happen, largely concentrated at weekends and during the summer. The casualties occurring on Saturday and Sunday combined, accounted for 39 per cent of the motorcyclist casualties in 2009. Powys had the highest number of motorcyclist casualties in 2009 – 71 casualties accounting for around 11 per cent of the Wales total. Although the biggest county, it has low population centres, clearly demonstrating a recreational link, as urban centres have lower accident rates. Although perhaps outside of the remit of destination management organisations, it is important to note that high levels of accidents have the potential to create negative press for destinations. Codes of practice can be developed by destinations to reduce accidents. There are also opportunities to place warning signs in areas of high motorcycle activity. This has recently been completed in Ceredigion.



The survey did not ask motorcycle tourists for their experience with motorcycle safety as the research was oriented on tourism. However we did ask motorcyclists for their favourite



road for motorcycling. These were plotted on a map, and those mentioned are shown in red. More popular roads were weighted accordingly and these are shown in figure . Clearly there is a bias towards the roads of mid Wales, particularly the A44 as these were the locations in which surveys were conducted. However, if we examine the plot of origin of respondents and the most popular roads, even if we take into account a mid Wales cluster, there is still a high degree of

preference for the roads in mid Wales from motorcyclists from the West Midlands or south Wales clusters. This information could be useful to both motorcycle tourism service providers (such as accommodation and catering establishments) as well as councils and police seeking to target safety campaigns in the most heavily used areas.



Figure 21

Location of motorcyclists 'most favourite roads' in Wales

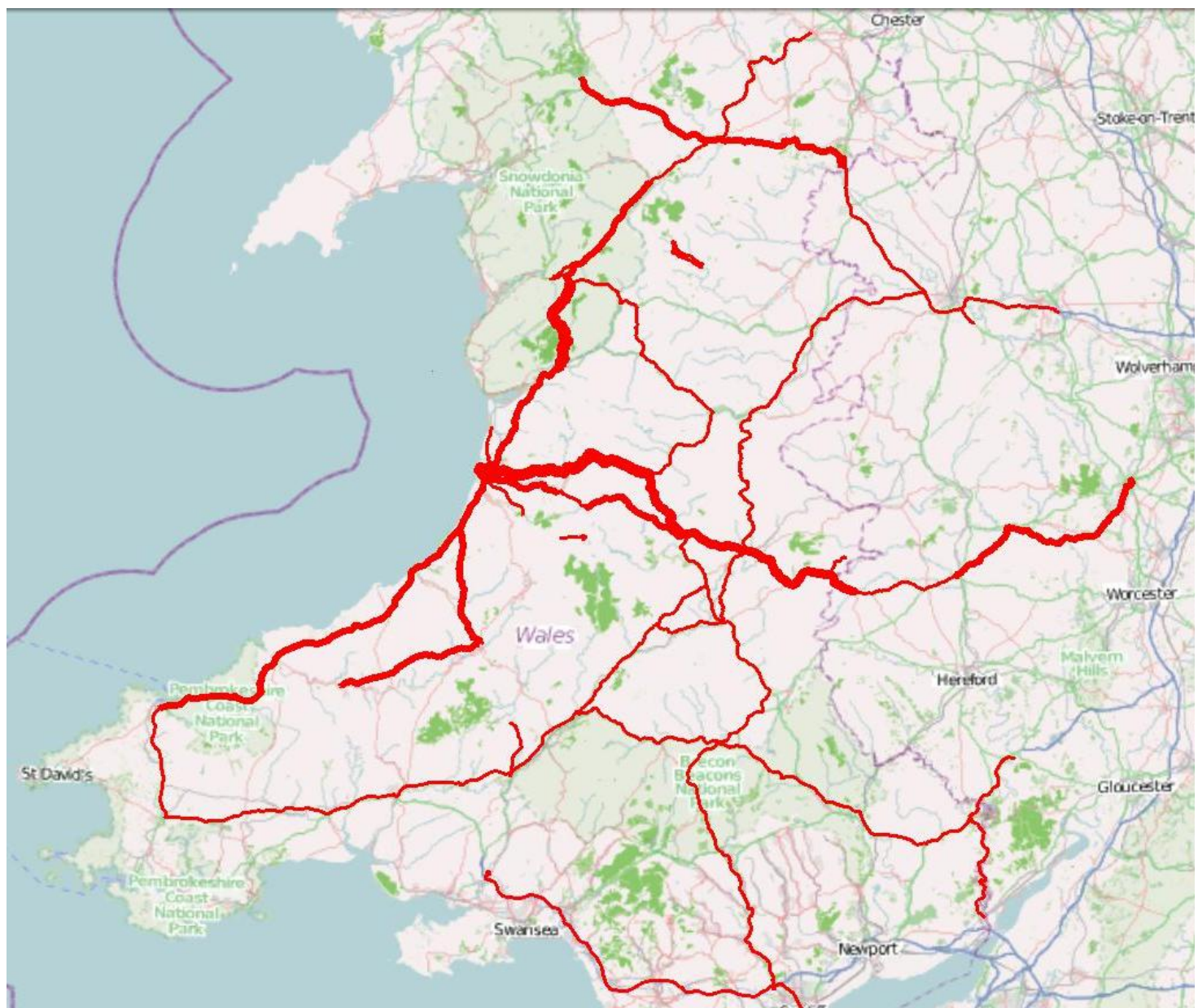


Figure 22

Weighted location
of motorcyclists
most favourite
roads in Wales

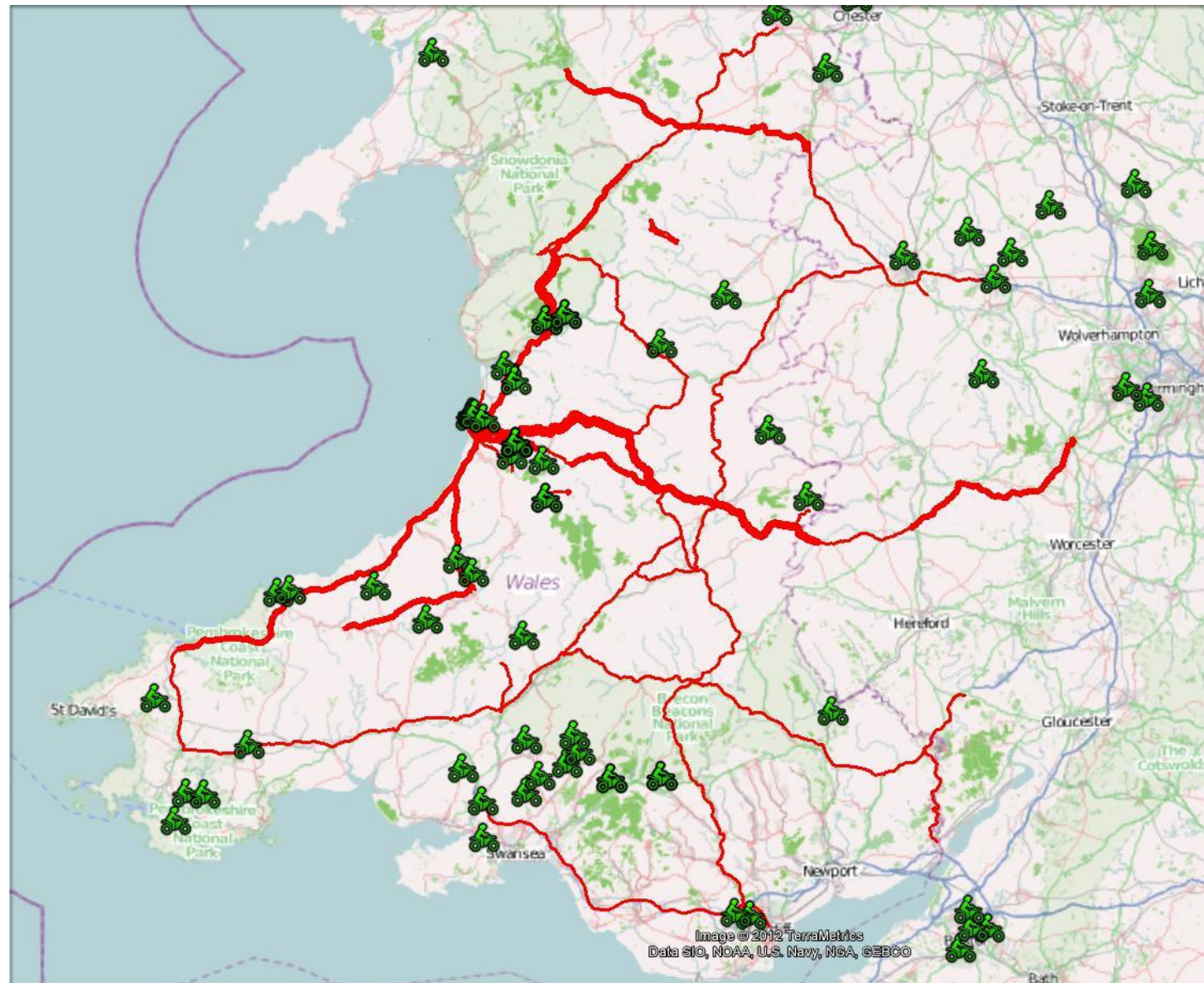


Figure 23

Weighted location of motorcyclists 'most favourite roads' in Wales with origin of motorcyclists

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<http://www.advrider.com/forums/showthread.php?t=573577>

<http://www.ruralgateway.org.uk/en/node/1238>

<http://www.bestbikingroads.com/motorcyclegps.php?n=The-Elan-Valley-Elan-Village-Devils-Bridge-&code=170290>

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July – 5 July 2011**

Bikers Beware! Organisational structures of Motorcycle Tourism in Wales

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Motorcycle touring has grown significantly in recent years in the UK, with a shift to larger capacity motorcycles and an increase in the average age of motorcyclists, with 50% of all active motorcyclists now aged 40 or over (DfT, 2007). The demographics of this group has meant that, increasingly, motorcycles are used for leisure purposes rather than commuting. Rural Wales, with a high proportion of the mountain and country roads favoured by motorcyclists, has seen a dramatic influx of these recreationists, helped by its proximity to the large population centres of the Midlands. Despite this significance there has been little academic work on the subject, or concerted efforts to embrace this market sector by destination marketing organisations. Although there have been some LEADER funded project efforts in Dumfries (motorcyclescotland, 2009), we know little of these motorcyclists travel patterns, needs, satisfaction or economic impact. There are also important issues concerning sustainability and safety, as the chance of a motorcycle rider being killed or seriously injured, per kilometre travelled, is around 54 times greater than for a car driver (WAG, 2009). This project will discuss the initial findings of an investigation into the motorcycling leisure and tourism sector in Ceredigion, examining travel patterns of motorcycle tourists, motivations and preferences of this group and the potential economic impact. This paper will specifically discuss how the motorcycle leisure sector has evolved in an organisational sense from its roots in a rebellious culture of the 1950s to a large mainstream (although often ignored) subculture today. A number of media influences will be discussed, such as celebrity tours and the impact of web communities on organisational practice.

APPENDIX C: QUESTIONNAIRE

Ceredigion

Motorcycling Survey

We are conducting a survey on motorcycling and tourism in Ceredigion. We would be grateful if you could fill out this short survey. Your participation is voluntary, and all results will be anonymous. If you have any questions about the survey or the project please contact Dr Carl Cater on 01970 621615 or cic@aber.ac.uk.

Section 1: About you and motorcycling

1. What make and model of bike (s) do you own?

.....

2. Is your bike for (tick all that apply and indicate a % of time and approx annual mileage)

- | | | | |
|---|--|--------|----------------------|
| 1 | <input type="checkbox"/> Commuting |% | |
| 2 | <input type="checkbox"/> Pleasure riding |% | total annual mileage |
| 3 | <input type="checkbox"/> Touring |% |miles |
| 4 | <input type="checkbox"/> Display |% | |
| 5 | <input type="checkbox"/> Racing |% | |

Total 100%

3. What percentage of time do you carry a pillion passenger?%

4. How many other motorbikes are you travelling with today?

- | | | | | | | | |
|---|----------------------------|---|------------------------------|---|------------------------------|---|------------------------------------|
| 1 | <input type="checkbox"/> 0 | 2 | <input type="checkbox"/> 1-2 | 3 | <input type="checkbox"/> 3-4 | 4 | <input type="checkbox"/> 5 or more |
|---|----------------------------|---|------------------------------|---|------------------------------|---|------------------------------------|

5. How long is your current trip?.....

5a. Where do you normally live?..... Postcode.....

6. What is your favourite stretch of road for riding your motorcycle?

.....

7. Are you a member of any motorcycling organisations? (tick all that apply)

1 ☐ MAG 2 ☐ Local motorcycling club 3 ☐ other

8. Do you read any motorcycling publications (eg Motorcycle News)

1 ☐ No 2 ☐ Yes (please list)

Section 2: Motorcycling and travel

9. How many leisure day trips do you take on your motorcycle each year?

1 ☐ none 2 ☐ 1-2 3 ☐ 3-4 4 ☐ 5-10 5 ☐ 10+

10. Where do you usually get information before embarking on a motorcycle trip (please tick all that apply)?

- 1 ☐ Other group members 2 ☐ Motorcycling Internet sites
 3 ☐ Official tourism website 4 ☐ Internet blogs
 5 ☐ Motorcycling books/guides 6 ☐ Motorcycle magazines
 7 ☐ Motorists websites (AA, Bing, etc.)
 8 ☐ Other sources (Please specify)

11. In choosing a destination when you are motorcycling which of these is important to you? Please mark your answer with a tick (✓)

	Very much 1	Quite a lot 2	Not much 3	Not at all 4	Don't know 5
Twisty roads					
Loop routes					
Weather					
Friendly locals					
Road condition					
Scenic stopping points					
Good restaurants and bars					
Local attractions					
Easy parking					
Supportive police					

Place to meet other bikers					
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Are any other factors important to you in choosing a destination when you are motorcycling?

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12. How many separate overnight trips for leisure do you take on your motorcycle a year?

1 ☐ none 2 ☐ 1-2 3 ☐ 3-4 4 ☐ 5-10 5 ☐ 10+

13. Have you travelled overseas with your motorcycle? 1 ☐ Yes 2 ☐ No

13a. If so, where is the furthest you have travelled by motorcycle?

14. In choosing accommodation when you are motorcycling which of these is important to you? Please mark your answer with a tick (✓)

	Very much 1	Quite a lot 2	Not much 3	Not at all 4	Don't know 5
Secure parking					
Drying room					
Easy to find					
Knowledgeable hosts					
Helpful hosts					
Hosts are bikers					
Proximity to restaurants/pubs					
Tarmaced drive					
Accredited/ star rated					

15. Are any other factors important to you in choosing accommodation when you are motorcycling?

16. Approximately how much have you spent on this trip so far? Please include as many different areas of spending as possible, with amounts to the best of your recollection.

If you have booked something, e.g. accommodation, but not actually paid for it yet, then please include it below as spending

Reason for spending	Amount (approx.) in £s	Where spent
Overnight accommodation		
<i>Example: B&B, two nights</i>	<i>£100 (my share of cost of the room tonight and tomorrow night)</i>	<i>Llety parc hotel, Aberystwyth</i>
Travel (including parking fees)		
<i>Example: Petrol</i>	<i>£20</i>	<i>Texaco Machynlleth</i>
Food and drink		
<i>Example: Fish and chip lunch</i>	<i>£5</i>	<i>Mariners, New Quay</i>
<i>Example: pub dinner and beers</i>	<i>£20</i>	<i>Hafod hotel, Devils Bridge</i>
Other spending		
<i>Example: Souvenirs</i>	<i>£10</i>	<i>Stars, Aberystwyth</i>

This is a detailed map of Wales and its surrounding regions, including parts of England, Scotland, and Ireland. The map shows major cities, towns, and villages, as well as roads, railways, and water bodies. A legend at the bottom left explains symbols for motorways, roads, railways, and other features. A scale bar at the bottom right indicates distances in miles and kilometers. A north arrow is located in the top left corner.

Legend:

- Traffwrdd (Motorways)
- Ffyrdd Deuol (Dual Carriageways)
- Prif Ffyrdd (Main Roads)
- Rheilffyrdd a gorsafedd (Railways and Stations)
- Rheilffyrdd cul (Narrow Gauge Railways)
- A44 (A44)
- Alfnydd, llynnoedd a chronffyrdd dŵr (Rivers, Lakes & Reservoirs)
- Ardaloedd o Harddwch Naturiol (Ethridol) a Pharciau Cenedlaethol (Areas of Outstanding Natural Beauty and National Parks)

Scale:

- 0 to 10 miles
- 0 to 16 kilometers

North Arrow:

The map includes a north arrow pointing towards the top left corner.

18. Are you visiting any attractions or doing any other activities apart from Motorcycling?

- 1 ☐ Have a meal in one of the pubs, cafés or restaurants
- 2 ☐ Have drinks in one of the pubs, cafés or restaurants
- 3 ☐ Visit a museum or other attraction
- 4 ☐ Do some shopping for groceries, etc
- 5 ☐ Shop for souvenirs, etc
- 6 ☐ Take a trip on the steam train
- 7 ☐ Visit the Tourism Information Centre
- 8 ☐ Other- please state

19. Have you been to any of these events in the past year? (please tick all that apply)

- 1 ☐ Motorcycle race
- 2 ☐ Motorcycle rally/ club event
- 3 ☐ Classic/custom motorcycle show
- 4 ☐ New motorcycle show
- 5 ☐ Other event (Please specify)

20. Do you have any general observations about motorcycling tourism?

.....

.....

.....

Section 3: About you

21. What is your gender? 1 ☐ Female 2 ☐ Male

22. Please indicate your age group

- 1 ☐ 16-24 2 ☐ 25-34 3 ☐ 35-44 4 ☐ 45-54 5 ☐ 55-64
- 6 ☐ 65+ 7 ☐ Prefer not to say

23. What is your current employment status?

- 1 ☐ Employed 2 ☐ Self employed 3 ☐ Retired
- 4 ☐ Student 5 ☐ Home maker 6 ☐ Unemployed
- 7 ☐ Other Please state

24. Please indicate your highest educational attainment

- 1 ☐ Primary school 2 ☐ Secondary school
- 3 ☐ Tertiary (College or University) 4 ☐ Postgraduate degree
- 5 ☐ Other Please state

***** THANK YOU FOR COMPLETING THIS QUESTIONNAIRE *****

**If you have anything else you would like to share please email
cic@aber.ac.uk or write your email here and we will be in touch**

Your Email.....



People in all the right places

About The Tourism Society

The Tourism Society is the professional membership body for people working in all sectors of the visitor economy.

The Society was founded in 1977 and has grown into an organisation with approximately 1000 members in the UK and overseas. Our aim is to drive up standards of professionalism in a fast-growing global industry which can have major social, economic and environmental impacts on communities and nations.

Membership is open to people working in every sector of the industry - public, private or voluntary. Existing members represent tour operators, hotel chains, PR, marketing and representation companies, tourist attractions, national, regional and local tourist boards, restaurants, trade media, charities, consultants, academics, students and educational establishments, among others.

The Society offers regular meetings throughout the UK (organised by the head office and our active regional and area Chapters), a quarterly journal, access to an extensive database of industry colleagues, signposts to better business opportunities and education and careers support.

The Society's two professional sections offer support to those who work in specific areas: the Tourism Management Institute (TMI) focuses on destination management, and the Tourism Consultants Network (TCN) allows consultants to increase their exposure to companies and organisations looking for external high quality expertise.

Whatever stage you have reached in your career, whether well-established or just starting out on a travel or tourism course at college or university, membership of the Tourism Society and the industry connections it gives access to will be a real asset.



Dr Carl Cater

Carl Cater is a Senior Lecturer in tourism at Aberystwyth University, Wales and is an expert on the development of niche tourism sectors such as adventure tourism and ecotourism. He has undertaken research and teaching worldwide, including Australia, China, Nepal, New Zealand, Norway, Papua New Guinea, Tibet and Vanuatu. He has consulted for organisations such as the World Tourism and Travel Council, the Great Barrier Reef Marine Park Authority, Seaworld and Tourism Queensland. He is a fellow of the Royal Geographical Society, a qualified pilot, diver, lifesaver, mountain and tropical forest leader, (and motorcyclist!) and maintains an interest in both the practice and pursuit of sustainable outdoor tourism activity. He has written over twenty papers and book chapters, is co-author (with Dr Erlet Cater) of *Marine Ecotourism: Between the Devil and the Deep Blue Sea* (CABI, 2007), the *Encyclopaedia of sustainable tourism* (CABI, 2013) and is an editorial board member of *Tourism Geographies*, *Journal of Ecotourism* and *Tourism in Marine Environments*.